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## State Overview

### UNEMPLOYMENT RATE AT 5.0 PERCENT IN JUNE

The seasonally adjusted unemployment changed in June, with the jobless rate increasing five-tenths of a percentage point to 5.0 percent. This unemployment rate is five-tenths of a percentage point below the 5.5 percent rate experienced in June 2003.

Current unemployment is the highest for the month of June since 1999 when the unemployment rate was 5.3 percent. The national unemployment rate in June was 5.6 percent, unchanged from May. For the first six months of 2004, Idaho's seasonally adjusted unemployment rate has averaged 4.7 percent compared to 5.6 percent for the first six months of 2003; the national unemployment rate has averaged 5.6 percent compared to 5.8 percent for the first six months of 2003. Labor force details for the state, labor market areas, counties, and cities can be found in State Table 1 on page 3.

Idaho's seasonally adjusted *Civilian Labor Force* increased by 5,300 in June to 706,400 persons. The number of employed persons increased by 1,700, to 670,900. The number of unemployed persons increased by 3,600, to 35,500, in June. The number of jobs increased from May to June, but could not keep up with the increased demand. This resulted in fewer job opportunities for youth looking for summer employment. As both high school and college students entered the labor force in search of summer employment, they found a tight job market. Adults who had been searching for work were taking many of the new jobs.

However, the changes in the *Civilian Labor Force* from June 2003 continue to be positive. From one year before, the number of employed persons increased 15,800, and the number of persons unemployed decreased 2,400. Overall, the labor force increased 1.9 percent, or 13,400 persons, since June 2003. The changes are very dramatic when June 2004 is compared to June 2002 and June 2000 as shown in State Table 2 on page 4.

### AREA AND COUNTY LABOR FORCE HIGHLIGHTS

Unemployment rates are calculated each month for eight Labor Market Areas (LMAs) in Idaho. The Idaho-Lewis LMA reported the highest unemployment rate at 8.9 percent, up 1.6 percentage points from May, the largest area increase. Bonneville LMA reported the lowest unemployment rate at 3.8 percent, up two-tenths of a percentage point.

Of the 44 counties in the state, four experienced double-digit unemployment rates in June. Those four were: Adams at 15.9 percent, Clearwater at 13.1 percent, Washington at 10.4 percent, and Power at 10.2 percent. The economic structure of these counties rely heavily on natural resources such as timber and agriculture.

Four counties reported an unemployment rate below 3.0 percent in June—Oneida and Franklin at 2.8 percent, Owyhee at 2.1 percent, and Madison at 1.5 percent.

Eight counties reported unemployment rates between 3.0 and 4.0 percent—Ada, Blaine, Gooding, Latah, Nez Perce, Teton, Bonneville, and Butte.

Clearwater County's unemployment rate increased 5.4 percentage points from May to reach 13.1 percent. Butte County reported the largest decrease, 1.2 percentage points, from May's rate. It dropped to 3.3 percent in June.

## AGRICULTURE

Farm sector employment in Idaho increased 3.6 percent in June to 44,480. The number of *Hired Workers* increased 4.7 percent (1,540 people), as the demand for irrigators and field workers increased.

Farmers throughout the state found themselves in a better situation than in 2003. State Table 3 on page 4 shows prices farmers received in June for seven major commodities. Prices for only one of the seven major commodities in June 2004 was lower than in June 2003. Significant changes include a 68 percent increase in milk prices, a 23 percent in wheat prices, and a 22 percent increase in beef cattle prices. State Table 3 is a comparison of the prices received in June for the past six years. The only commodity that is below the June 1999 price is potatoes, down \$1.00 per bushel. The prices vary from year to year but are better than they were. However, the cost of producing these commodities has also increased.

The prices received for commodities is only one of the issues facing farmers this year. A major issue is water, or rather the lack of it. As most of Idaho is experiencing a sixth year of drought conditions, the availability of water becomes a major factor in the 2004 crop production. As of August 25, 23 of Idaho's 44 counties had been declared drought emergency areas. The counties in order of the declaration are: Clark, Butte, Lincoln, Caribou, Fremont, Lemhi, Custer, Gooding, Blaine, Power, Madison, Bonneville, Bannock, Oneida, Jefferson, Bingham, Teton, Twin Falls, Elmore, Franklin, Cassia, Jerome, and Bear Lake. Under the declarations, irrigators in the counties can work with the Idaho Department of Water Resources (DWR) to secure temporary water rights and make modifications to existing water rights. The drought emergency declarations are effective until December 31 unless extended or terminated by the DWR director.

In July, crops began reaching normal growth levels. Included among major agricultural activities were weeding, thinning, harvesting peas, detasseling corn, cutting hay, harvesting cherries, and irrigating. The grain harvest should be completed in August.

## NONFARM HIGHLIGHTS

The predominant trend since 1986 shows the number of *Nonfarm Payroll Jobs* peaking in June, dropping in July, and then increasing on a monthly basis through October.

June is a great month for employment opportunities. The weather is perfect for outdoor work such as construction, landscaping, gardening, and recreation. Government agencies hire for the fire season as well as for grounds keeping and summer recreational programs. Lodging facilities, amusement parks, eating establishments, and tourist shops are geared up for the summer season. School is out and summer vacations begin in earnest. Support activity for the agriculture sector also increases as the food processing plants and fresh pack warehouses empty their storage facilities to make room for the 2004 crop. These activities, combined with a stable but growing economy, have helped to make June 2004 part of an on-going trend.

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## Comparison of May to June

State Table 4 on page 5 provides month-over-month and year-over-year comparisons of Nonfarm Payroll Jobs.

Nonfarm Payroll Jobs showed an increase of 8,000 jobs (up 1.4 percent) in June, bringing employment to 593,900. There were more opportunities in the *Goods-Producing Industries* with the addition of 4,100 jobs bringing the number of jobs to 106,800. Growth in the *Service-Providing Industries* accounted for the other 3,900 jobs to 487,100.

Construction added more jobs in June in the *Goods-Producing Industries* than any other sector. Employment increased by 2,500 workers to reach 41,400. While all of the individual sectors reported an increase in employment during June, the *Special Trades Contractors* added the most—1,400 workers. This was slightly above the combined growth of *Construction of Building and Heavy & Civil Engineering Construction*.

Logging had the largest growth in *Natural Resources*. This sector also had the largest percent increase of all published sectors. Weather conditions were right so that loggers and their equipment could get into the forested areas. The addition of 600 new jobs brought employment to 2,000 in June.

Manufacturing had the largest number of jobs in the *Goods-Producing Industries* with 61,500 in June. This was an increase of 900 jobs from May but was 800 fewer than in June 2003. The addition of 200 jobs in *Computer & Electronic Products Manufacturing* brought that sector's total employment to 16,900 in June. This was the largest month-over-month growth that this industry has experienced this year.

The addition of 200 *Food Manufacturing* jobs in June brought employment in that sector to 15,600. Growth in the *Canned, Frozen, & Preserved Fruits, Vegetables, & Food Specialties* accounted for half of the growth as corn processing started and contributed 100 new jobs. Employment in *Food Manufacturing* will show an increase in July as the pea harvest begins, and will continue to grow through September with potato, dry bean, sugar beet, and fruit harvests. The closure of the J.R. Simplot potato processing facility in November 2003 resulted in a permanent loss of several hundred jobs in this sector. The number of jobs lost varied because of the seasonal nature of processing potatoes.

Job increases of 3,100 (5.7 percent) occurred in June in the *Leisure & Hospitality* industry, accounting for the largest growth in the *Service-Providing Industries*. Employment increased by 1,300 (17.8 percent) in *Arts, Entertainment, & Recreation* to 8,600 at golf courses, amusement parks, and other recreational facilities. As tourists began to visit Idaho another 900 jobs were added in the *Accommodation* sector. The seasonal increase in these two sectors also led to a seasonal increase of 900 jobs in *Food Services & Drinking Places*. The demand for temporary workers increased in June, resulting in 700 additional jobs in the *Administrative & Support Services* sector of *Professional & Business Services*.

There were 74,400 total jobs in *Retail Trade* during June. *Building Materials & Garden Supplies* had the largest job growth (200) as they began supplying home improvement

State Table 1: June 2004 Labor Force (preliminary)

Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
<b>Seaport LMA</b>	35,457	1,403	4.0	34,055
Nez Perce County	23,399	797	3.4	22,602
Asotin County, WA	12,058	605	5.0	11,453
<b>Boise City MSA</b>	253,447	11,639	4.6	241,808
Ada County	181,402	7,282	4.0	174,121
Canyon County	72,044	4,357	6.0	67,687
<b>Pocatello City MSA*</b>	41,231	1,879	4.6	39,352
<b>Bonneville LMA</b>	88,114	3,307	3.8	84,807
Bingham County	23,750	1,095	4.6	22,655
Bonneville County	51,742	1,702	3.3	50,040
Butte County	1,641	54	3.3	1,588
Jefferson County	10,981	457	4.2	10,524
<b>Cassia-Minidoka LMA</b>	19,639	1,582	8.1	18,057
Cassia County	9,885	674	6.8	9,211
Minidoka County	9,754	908	9.3	8,846
<b>Idaho-Lewis LMA</b>	7,899	700	8.9	7,199
Idaho County	6,457	639	9.9	5,818
Lewis County	1,443	61	4.2	1,382
<b>Panhandle LMA</b>	96,056	6,652	6.9	89,404
Benewah County	4,413	415	9.4	3,998
Bonner County	18,662	1,308	7.0	17,354
Boundary County	4,608	338	7.3	4,270
Kootenai County	62,054	4,057	6.5	57,997
Shoshone County	6,319	534	8.5	5,785
<b>Magic Valley LMA</b>	57,965	2,419	4.2	55,546
Gooding County	8,064	283	3.5	7,780
Jerome County	10,800	452	4.2	10,347
Twin Falls County	39,102	1,684	4.3	37,418
Adams County	1,635	260	15.9	1,375
Bear Lake County	2,962	132	4.5	2,829
Blaine County	12,886	504	3.9	12,382
Boise County	2,842	159	5.6	2,682
Camas County	492	31	6.3	461
Caribou County	3,329	222	6.7	3,107
Clark County	638	38	5.9	601
Clearwater County	3,659	481	13.1	3,178
Custer County	1,906	126	6.6	1,781
Elmore County	9,424	614	6.5	8,811
Franklin County	5,634	155	2.8	5,479
Fremont County	4,084	258	6.3	3,826
Gem County	5,361	371	6.9	4,991
Latah County	15,089	525	3.5	14,563
Lemhi County	3,874	260	6.7	3,615
Lincoln County	2,085	121	5.8	1,964
Madison County	12,021	183	1.5	11,838
Oneida County	1,833	52	2.8	1,781
Owyhee County	4,431	91	2.1	4,340
Payette County	9,313	757	8.1	8,557
Power County	3,091	315	10.2	2,776
Teton County	4,079	134	3.3	3,945
Valley County	4,154	298	7.2	3,856
Washington County	4,107	426	10.4	3,681
<b>State of Idaho</b>	<b>706,394</b>	<b>35,489</b>	<b>5.0</b>	<b>670,905</b>
<b>Idaho Cities</b>				
Boise	114,980	4,513	3.9	110,467
Coeur d'Alene	21,924	1,086	5.0	20,838
Idaho Falls	32,127	1,064	3.3	31,064
Lewiston	19,787	586	3.0	19,201
Nampa	22,043	1,418	6.4	20,625
Pocatello	29,514	1,296	4.4	28,218
Twin Falls	20,397	907	4.4	19,490

\* Pocatello MSA includes all of Bannock County.

State Table 2: Labor Force Changes June 2002-June 2004

				Numeric Change From		Percent Change From	
	June 2004	June 2002	June 2000	June 2002	June 2000	June 2002	June 2000
Civilian Labor Force	706,400	684,500	655,700	21,900	28,800	3.2	7.7
Unemployed	35,500	39,200	31,500	-3,700	7,700	-9.4	12.7
% of Labor Force Unemployed	5.0	5.7	4.8	-0.7	0.9		
Total Employment	670,900	645,300	624,200	25,600	21,100	4.0	7.5

State Table 3: Commodity Prices Received

Commodity	Unit	June 2004	June 2003	June 2002	June 2001	June 2000	June 1999	Percent Change 6/04-6/03	Percent Change 6/04-6/99
Alfalfa Hay	Ton	\$105.00	\$90.00	\$96.00	\$111.00	\$95.00	\$66.00	16.7	59.1
Barley	Bushel	\$2.99	\$3.10	\$2.74	\$2.23	\$2.55	\$2.38	-3.5	25.6
Dry Beans	Bushel	\$19.90	\$17.70	\$23.20	\$17.50	\$14.20	\$16.10	12.4	23.6
Wheat	Bushel	\$4.02	\$3.27	\$3.12	\$3.12	\$2.47	\$2.74	22.9	46.7
Potatoes	cwt.*	\$4.25	\$4.00	\$8.20	\$3.85	\$4.35	\$5.25	6.3	-19.0
Beef Cattle	cwt.*	\$82.70	\$67.90	\$57.70	\$66.90	\$62.80	\$58.50	21.8	41.4
Milk, All	cwt.*	\$17.00	\$10.10	\$10.60	\$14.60	\$10.60	\$12.10	68.3	40.5

\* - hundredweight

SOURCE: Idaho Agriculture Statistics

products, seeds, plants, shrubs, and fertilizer to yard and garden enthusiasts. The additional 400 new jobs were spread throughout the other retail sectors.

*Educational Services* reported the only loss of jobs in the private sector of the *Service-Providing Industries*. The end of the spring semester at BYU-Idaho in Rexburg resulted in a loss of nearly 600 jobs. These jobs are generally filled by students and are seasonal in nature. The university planned to hire some students to work during the two summer terms, but no significant increase in the number of jobs will happen until late August. In 2003, BYU-Idaho had an average of 1,800 students working. This ranged from a low of 1,200 in June to a high of nearly 2,300 students in November.

The increase of 2,400 new jobs in *Federal Government* reflects seasonal growth in this sector. Preparation for fire season and increased management of range and forest lands accounted for the majority of the job growth.

As colleges and universities completed their spring semester, student workers graduated or returned home for the summer. The loss of 3,100 workers brought the number of jobs in *State Government Education* to 11,700, a 20.9 percent decrease. *Local Government Education* also experienced a drop in jobs, 2.4 percent or 900 workers, as most elementary and secondary schools closed for summer vacations.

#### Comparison of June 2003 to June 2004

Between June 2003 and June 2004, there were 12,700 new jobs added. The growth rate of 2.2 percent in *Nonfarm Payroll Jobs* was the largest year-over-year percentage change experienced this year and occurred both in May and June. Job growth in the last 12 months has significantly

improved over job growth in the prior twelve months; the year-over-year growth in between June 2002 and June 2003 was only 0.4 percent. This emphasizes that job growth continues to have a positive impact on Idaho's economy.

*State Government Administration* and *Telecommunications* led the way in percentage growth over the year with 9.8 percent and 9.7 percent, respectively.

Call centers have become important players in Idaho's nonfarm industry employment. Because of the composition of the industry, employment is difficult to track. The call centers are involved in catalog sales, help lines, telemarketing, customer services, and market research.

*Construction* continued to be strong with a 7.5 percent increase, which is an addition of 2,900 new jobs.

The only other industrial sector that experienced a year-over-year increase was *Computer & Electronic Products Manufacturing*. This sector reported 16,900 jobs in June, which was 900 more jobs than in June 2003, but was below the 18,000 jobs in June 2002. This sector is slowing recovering from the major economic downturn that was experienced in 2002 and early 2003.

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State Table 4: Nonfarm Payroll Jobs

BY PLACE OF WORK	% Change From				
	Jun 2004*	May 2004	Jun 2003	Last Month	Last Year
<b>Nonfarm Payroll Jobs**</b>	593,900	585,900	581,200	1.4	2.2
<b>GOODS-PRODUCING INDUSTRIES</b>	106,800	102,700	104,500	4.0	2.2
<b>Natural Resources &amp; Mining</b>	3,900	3,200	3,700	21.9	5.4
Logging	2,000	1,400	1,800	42.9	11.1
Mining	1,900	1,800	1,900	5.6	0.0
Metal Ore Mining	500	500	500	0.0	0.0
<b>Construction</b>	41,400	38,900	38,500	6.4	7.5
<b>Manufacturing</b>	61,500	60,600	62,300	1.5	-1.3
Durable Goods	38,100	37,400	38,100	1.9	0.0
Wood Product Manufacturing	7,200	7,000	7,200	2.9	0.0
Sawmills & Wood Preservation	2,900	2,800	3,000	3.6	-3.3
Veneer & Engineered Products	1,400	1,200	1,200	16.7	16.7
Other Wood Product Manufacturing	2,900	3,000	3,000	-3.3	-3.3
Fabricated Metal Product Manufacturing	3,500	3,500	3,500	0.0	0.0
Machinery Manufacturing	2,700	2,700	2,700	0.0	0.0
Computer & Electronic Product Manufacturing	16,900	16,700	16,000	1.2	5.6
Transportation Equipment Manufacturing	2,200	2,200	2,300	0.0	-4.3
Other Durable Goods	5,600	5,300	6,400	5.7	-12.5
Nondurable Goods	23,400	23,200	24,200	0.9	-3.3
Food Manufacturing	15,600	15,400	16,000	1.3	-2.5
Fruits & Vegetable Preserving & Specialty	7,300	7,200	8,000	1.4	-8.8
Paper Manufacturing	1,600	1,600	1,600	0.0	0.0
Printing & Related Support Activities	1,900	1,900	2,100	0.0	-9.5
Chemical Manufacturing	1,800	1,800	1,900	0.0	-5.3
Other Nondurable Goods	2,500	2,500	2,600	0.0	-3.8
<b>SERVICE-PROVIDING INDUSTRIES</b>	487,100	483,200	476,700	0.8	2.2
<b>Trade, Transportation, &amp; Utilities</b>	118,200	117,100	116,200	0.9	1.7
Trade	99,200	98,300	97,700	0.9	1.5
Wholesale Trade	24,800	24,500	25,000	1.2	-0.8
Wholesalers, Durable Goods	11,400	11,200	11,600	1.8	-1.7
Wholesalers, Nondurable Goods	11,000	10,900	11,400	0.9	-3.5
Retail Trade	74,400	73,800	72,700	0.8	2.3
Motor Vehicle and Parts Dealers	11,100	11,000	11,000	0.9	0.9
Building Material and Garden Equipment	8,600	8,400	8,100	2.4	6.2
Food & Beverage Stores	12,500	12,400	12,400	0.8	0.8
General Merchandise Stores	15,200	15,100	14,800	0.7	2.7
Transportation, Warehousing, & Utilities	19,000	18,800	18,500	1.1	2.7
Utilities	1,900	1,900	1,900	0.0	0.0
Transportation & Warehousing	17,100	16,900	16,600	1.2	3.0
Rail Transportation	1,200	1,200	1,200	0.0	0.0
Truck Transportation	8,500	8,300	8,200	2.4	3.7
<b>Information</b>	9,400	9,400	9,300	0.0	1.1
Telecommunications	3,400	3,400	3,100	0.0	9.7
<b>Financial Activities</b>	27,600	27,300	27,200	1.1	1.5
Finance & Insurance	20,500	20,500	20,200	0.0	1.5
Real Estate & Rental & Leasing	7,100	6,800	7,000	4.4	1.4
<b>Professional &amp; Business Services</b>	75,700	74,700	71,600	1.3	5.7
Professional, Scientific, & Technical	30,100	29,900	29,000	0.7	3.8
Scientific Research & Development	7,300	7,300	7,400	0.0	-1.4
Management of Companies & Enterprises	7,300	7,300	7,400	0.0	-1.4
Administrative & Support & Waste Management	38,300	37,500	35,200	2.1	8.8
Administrative & Support Services	37,100	36,400	34,100	1.9	8.8
Educational & Health Services	63,100	63,500	61,800	-0.6	2.1
Educational Services	6,000	6,600	6,000	-9.1	0.0
Health Care & Social Assistance	57,100	56,900	55,800	0.4	2.3
Hospitals	13,400	13,500	13,200	-0.7	1.5
Leisure & Hospitality	57,500	54,400	57,000	5.7	0.9
Arts, Entertainment, & Recreation	8,600	7,300	8,900	17.8	-3.4
Accommodation & Food Services	48,900	47,100	48,100	3.8	1.7
Accommodation	8,300	7,400	8,000	12.2	3.8
Food Services & Drinking Places	40,600	39,700	40,100	2.3	1.2
Other Services	18,500	18,400	18,300	0.5	1.1
<b>Total Government</b>	117,100	118,400	115,300	-1.1	1.6
Federal Government	16,100	13,700	15,100	17.5	6.6
State & Local Government	101,000	104,700	100,200	-3.5	0.8
State Government	28,500	31,600	27,600	-9.8	3.3
State Government Education	11,700	14,800	12,300	-20.9	-4.9
State Government Administration	16,800	16,800	15,300	0.0	9.8
Local Government	72,500	73,100	72,600	-0.8	-0.1
Local Government Education	36,300	37,200	36,700	-2.4	-1.1
Local Government Administration	33,300	33,100	32,900	0.6	1.2
Local Government Tribes	2,900	2,900	3,000	0.0	-3.3

\*Preliminary Estimate

\*\* Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

State Table 5: Economic Indicators

	Jun 2004	May 2004	Jun 2003	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE <sup>(1)</sup>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	706,400	701,100	693,000	0.8	1.9
Unemployment	35,500	31,900	37,900	11.3	-6.3
Percent of Labor Force Unemployed	5.0	4.5	5.5		
Total Employment	670,900	669,200	655,100	0.3	2.4
<b>Unadjusted</b>					
Civilian Labor Force	717,500	702,700	704,000	2.1	1.9
Unemployment	32,100	30,400	34,500	5.6	-7.0
Percent of Labor Force Unemployed	4.5	4.3	4.9		
Total Employment	685,400	672,300	669,500	1.9	2.4
U. S. UNEMPLOYMENT RATE <sup>(2)</sup>					
	5.6	5.6	6.3		
U.S. CONSUMER PRICE INDEX <sup>(2)</sup>					
Urban Wage Earners & Clerical Workers (CPI-W)	185.3	184.7	179.6	0.3	3.2
All Urban Consumer (CPI-U)	189.7	189.1	183.7	0.3	3.3
AGRICULTURE					
Agriculture Employment	44,480	42,940	43,600	3.6	2.0
Operators	9,740	9,740	9,010	0.0	8.1
Unpaid Family	360	360	360	0.0	0.0
Hired Workers	34,380	32,840	34,230	4.7	0.4
UNEMPLOYMENT INSURANCE					
<b>Claims Activities</b>					
Initial Claims <sup>(3)</sup>	7,459	6,930	9,832	7.6	-24.1
Weeks Claimed <sup>(4)</sup>	58,298	54,014	93,249	7.9	-37.5
<b>Benefit Payment Activities<sup>(5)</sup></b>					
Weeks Compensated	48,396	45,639	67,413	6.0	-28.2
Total Benefit \$ Paid	\$10,178,511	\$9,823,004	\$14,765,834	3.6	-31.1
Average Weekly Benefit Amount	\$210.32	\$215.23	\$219.04	-2.3	-4.0
Covered Employers	42,460	42,434	41,117	0.1	3.3
Total Benefit \$ Paid During Last 12 Months <sup>(4)</sup>	\$190,566,806	\$195,154,129	\$215,328,167	-2.4	-11.5

(1) Preliminary Estimate

(2) Source: U.S. Bureau of Labor Statistics

(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims

(4) Includes all entitlements/programs, Intrastate and Interstate Agent

(5) Includes all entitlements/programs, Total Liable Activities



# PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

## EMPLOYMENT TRENDS

The Panhandle's seasonally adjusted unemployment rate rose from 5.9 percent in May to 6.9 percent in June, not because the economy slowed down, but because the booming economy has encouraged so many people to join the labor force. During the troubled economic times that began in late 2000 and continued until last summer, many Panhandle residents who lost jobs gave up looking for work. Because these *discouraged workers* were not actively seeking work, they were classified as *not in the labor force* instead of *unemployed*. Now that these people see many job opportunities becoming available, they have returned to the labor market. Also adding to the labor market are many families attracted by the Panhandle lifestyle and potential jobs who moved here from other parts of the U.S. in June as soon as their children were out of school. In addition, growing job opportunities have encouraged more teens to look for work this summer than during the previous two summers. Until the formerly discouraged workers, new residents, and teenagers find jobs, they are counted as unemployed. This "encouraged worker effect" is not unusual in an economic resurgence, and actually is a good, albeit confusing, sign.

Clearer signs of economic growth are the 4.9 percent increase in *Total Employment*—the number of residents working for pay or profit—between June 2003 and June 2004, and the drop in the unemployment rate from 8.1 percent to 6.9 percent in the same period. Adding to the picture of glowing economic health is the 3.9 percent growth in *Total Nonfarm Payroll Jobs*. Panhandle Table 1 shows that every industrial sector added jobs. All five Panhandle counties are sharing in the economic growth brought by booming real estate markets, record construction levels, improved outlooks for mining and lumber, surging tourism, growing call centers, recovering manufacturing sectors, and the effects of rising incomes on retail and services sectors.

Panhandle Table 1: Labor Force & Employment

	Jun 2004*	May 2004	Jun 2003	% Change From	
				Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	96,050	94,520	92,720	1.6	3.6
Unemployed	6,650	5,590	7,520	19.0	-11.6
% of Labor Force Unemployed	6.9	5.9	8.1		
Total Employment	89,400	88,930	85,200	0.5	4.9
<b>Unadjusted</b>					
Civilian Labor Force	97,360	94,570	93,790	3.0	3.8
Unemployed	5,420	5,460	6,160	-0.7	-12.0
% of Labor Force Unemployed	5.6	5.8	6.6		
Total Employment	91,940	89,110	87,630	3.2	4.9
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs** - NAICS</b>	74,090	72,240	71,320	2.6	3.9
<b>Goods-Producing Industries</b>	13,960	13,350	13,620	4.6	2.5
Natural Resources & Mining	1,460	1,300	1,440	12.3	1.4
Construction	5,310	4,950	5,060	7.3	4.9
Manufacturing	7,190	7,100	7,120	1.3	1.0
Wood Product Manufacturing	2,730	2,720	2,800	0.4	-2.5
Other Manufacturing	4,460	4,380	4,320	1.8	3.2
<b>Service-Providing Industries</b>	60,130	58,890	57,700	2.1	4.2
Trade, Transportation, & Utilities	14,030	13,970	13,420	0.4	4.5
Wholesale Trade	1,400	1,400	1,410	0.0	-0.7
Retail Trade	10,880	10,860	10,320	0.2	5.4
Utilities	400	400	390	0.0	2.6
Transportation & Warehousing	1,350	1,310	1,300	3.1	3.8
Information	1,350	1,340	1,110	0.7	21.6
Financial Activities	3,160	3,130	2,920	1.0	8.2
Professional & Business Services	6,880	6,780	6,680	1.5	3.0
Educational & Health Services	7,140	7,140	6,850	0.0	4.2
Leisure & Hospitality	9,990	9,030	9,560	10.6	4.5
Other Services	2,340	2,310	2,260	1.3	3.5
Government Education	5,010	5,340	4,890	-6.2	2.5
Government Administration	8,960	8,650	8,820	3.6	1.6
Government Tribes	1,270	1,200	1,190	5.8	6.7

\* Preliminary estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

## AREA DEVELOPMENTS

### Benewah County

- The Coeur d'Alene Tribal Housing Authority recently broke ground on a \$2.5 million apartment complex in Plummer for elderly and disabled tribal members. Funded by a grant from the U.S. Department of Housing and Urban Development, the 20,000-square-foot building will include 20 apartments. The apartment complex on the north end of Plummer will be only half a mile away from the tribe's Benewah Medical and Wellness Center.
- The newly renovated Fort Hemenway Manor celebrated its grand opening July 31. Owned by Gigi Babeaux and Deborah Moskovitz, the bed and breakfast is in a 100-year-old house at 1001 West Jefferson



Avenue in St. Maries and offers four guest rooms. The phone number is (208) 245-7979.

### **Bonner County**

- Hidden Lakes Golf Resort, eight miles east of Sandpoint, has \$100 million worth of long-term plans including hundreds of new housing units, a 200-slip marina and yacht club on Lake Pend Oreille, an equestrian center, a spa, and convention facilities. It hopes to become to Lake Pend Oreille what the Coeur d'Alene Resort is to Lake Coeur d'Alene. Hidden Lakes already has 171 home sites platted around the golf course. With the real estate market in Sandpoint at a historic high, there is strong demand for second homes, retirement homes, and investment properties. This summer Hidden Lakes is constructing a 36-unit condo development near its clubhouse, and has begun discussions with Bonner County Planning on a planned unit development.
- Hopes are even higher these days at the Hi Hopes Café & Market, the historic general store in downtown Hope on the north shore of Lake Pend Oreille. In April, Christine Holbert, owner of Lost Horse Press in Sandpoint, and Kally Thurman, an artist and art dealer, bought one-and-a-half acres of property including the market (founded in 1939), the Hope post office, and four vintage cabins. They plan to transform the area into a haven for artists and writers.

Lost Horse Press, established by Holbert in 1999, is a nonprofit independent press that publishes poetry, fiction, and creative nonfiction titles of high literary merit. The press frequently sponsors writer workshops attracting about 75 people each, and Holbert had been looking for an ideal place to hold them. Another advantage of the location is the proximity of another revitalized landmark, the Hotel Hope, where workshop participants can stay. A building to house the workshop and a stage for authors, poets, musicians, and performance artists is under construction behind the old market. Thurman plans to open a fine art gallery there and will sponsor art classes and workshops. The café will continue to serve light meals, desserts, and coffee to drop-by customers, but also will provide meals for the workshops.

According to the U.S. Census Bureau, in 2003, 83 people lived in Hope, which is 12 miles southeast of Sandpoint on Highway 200, and 212 people lived in East Hope, immediately to the east.

- Jack Donais recently opened Bordertown Feed on Highway 2 in Priest River. As well as selling feed for pets and hoses, the store sells fencing, saddles, horse tack, and buffalo meat.

### **Boundary County**

- This fall, the Kootenai Tribe will break ground on a major addition on Kootenai River Inn and Casino, its 65-room hotel and 400-machine gaming casino in Bonners Ferry. When the addition is completed next fall, it will provide 300 seats in two dining rooms and 50 seats in a smaller meeting room, allowing the inn to host larger conferences. The addition will feature a sculpted river flowing across a vaulted ceiling that ends in a live waterfall. The tribe renovated the hotel rooms last winter. The Kootenai River Inn and Casino, managed by Hagadone Hospitality, employs more than 150 people.
- On July 24, Bonners Ferry celebrated completion of its downtown revitalization project that included new sidewalks, lighting, signage, and landscaping. Later this year, construction will begin on a pedestrian underpass under Highway 95 that will link the Kootenai River Inn to downtown Bonners Ferry.
- It's no joke. Boundary County is home to a comedy club in a tree fort. Located just off U.S. Highway 95 near Bonners Ferry, the Tower, billed by owner Rick Reed as the world's smallest comedy club, brings comedians from Seattle, Los Angeles, and other areas to perform on the last weekend of each month. Reed started the Tower as a tree house, which metamorphosed into an elaborate wooden fort with balconies, towers, lofts, patios, and hidden passages. Reed decided to use the fort as a comedy club with seating for up to 50 people.

### **Kootenai County**

- Developer Rob Brewster currently is restoring buildings at 309 and 311 Maine Street in downtown Spirit Lake at a cost of \$500,000. When the project is complete, the buildings will include a 40-seat restaurant with a 20-seat outside dining area, a 1,750-square-foot antique store, and other retail businesses on the first level with six loft-style apartments above. The restaurant, expected to open later this year, will serve pasta, sandwiches, and a selection of microbrews and wines. Spirit Lake, located about 25 miles northwest of Coeur d'Alene, is home to 1,450 people.
- Rathdrum recently welcomed S.G.S. Fireplace Center at 6538 West Commerce Park Avenue. Owned by Carol and Randy Diemert, the store sells and installs air conditioning systems and gas, wood, and electric fireplaces.

### **Shoshone County**

- Silver Mountain Resort in Kellogg now offers one more summertime attraction along with rides on the world's longest gondola, miles of biking and hiking

*Continued on page 27*





# SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

## EMPLOYMENT TRENDS

Seaport's seasonally adjusted unemployment rate increased in June to 3.9 percent from May's rate of 3.8 percent, as shown in Seaport Table 1. In June 2003, the rate was 4.4 percent. Total *Nonfarm Payroll Jobs* showed a increase of 210 from May 2004. However, year-over-year data show a decrease of 980 jobs from June 2003. In spite of the year ago decreases, the increase in June, which is usually a strong employment month, is good news. Jobs in *Education & Health Services* continue to increase.

## SPECIAL TOPIC: North Central Idaho City Population

The population in rural North Central Idaho (NCI) cities between 2000 and 2003 decreased, according to recently released data by the U.S. Bureau of Census. State-wide the census estimates reconfirmed that since the late 1990s, Idaho's growth has been concentrated in the Boise and Coeur d'Alene areas. Details are shown in Seaport Table 2 on page 10.

## AREA DEVELOPMENTS

### Clearwater County

- The U.S. Forest Service is in the process of researching the possible consolidation and relocation of 23 positions from the Clearwater National Forest, and hundreds of jobs nationwide, in an attempt to deal with high overhead costs so that the forests have more funding to spend on natural resource projects. The Clearwater County jobs would be moved to an unknown central location outside of Idaho. According to Kimberly Nelson of the Clearwater National Forest, in addition to the 18 human resource positions, three positions within information technology and two budget and finance positions are affected by similar studies. According to Nelson, local Forest Supervisor Larry Dawson brought the concerns regarding the economic impact of such a decision on this already economically stressed rural community to the attention of the Chief of the

Seaport Table 1: Labor Force & Employment  
Nez Perce County, Idaho and Asotin County, Washington

	Jun 2004*	May 2004	Jun 2003	% Change From	
				Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	35,460	35,050	36,290	1.2	-2.3
Unemployment	1,400	1,340	1,610	4.5	-13.0
% of Labor Force Unemployed	3.9	3.8	4.4		
Total Employment	34,060	33,710	34,680	1.0	-1.8
<b>Unadjusted</b>					
Civilian Labor Force	35,470	35,050	36,290	1.2	-2.3
Unemployment	1,300	1,190	1,500	9.2	-13.3
% of Labor Force Unemployed	3.7	3.4	4.1		
Total Employment	34,170	33,860	34,790	0.9	-1.8
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs** - NAICS</b>	25,970	25,760	26,950	0.8	-3.6
<b>Goods-Producing Industries</b>	4,490	4,410	4,670	1.8	-3.9
Natural Resources & Mining	210	210	230	0.0	-8.7
Construction	1,120	1,030	1,250	8.7	-10.4
Manufacturing	3,160	3,170	3,190	-0.3	-0.9
Wood Product Manufacturing	560	550	560	1.8	0.0
Food Manufacturing	250	140	140	78.6	78.6
Paper Manufacturing	1,190	1,190	1,160	0.0	2.6
Other Manufacturing	1,160	1,290	1,330	-10.1	-12.8
<b>Service-Providing Industries</b>	21,480	21,350	22,280	0.6	-3.6
Trade, Transportation & Utilities	5,270	5,420	5,530	-2.8	-4.7
Wholesale Trade	600	590	630	1.7	-4.8
Retail Trade	3,450	3,570	3,600	-3.4	-4.2
Utilities	90	90	90	0.0	0.0
Transportation & Warehousing	1,130	1,170	1,210	-3.4	-6.6
Information	350	350	390	0.0	-10.3
Financial Activities	1,850	1,850	1,850	0.0	0.0
Professional & Business Services	1,330	1,280	1,570	3.9	-15.3
Education & Health Services	4,020	3,910	4,030	2.8	-0.2
Leisure & Hospitality	2,450	2,470	2,640	-0.8	-7.2
Other Services	1,060	1,080	1,120	-1.9	-5.4
Government Education	2,380	2,260	2,250	5.3	5.8
Government Administration	1,900	1,860	2,070	2.2	-8.2
Government Tribes	870	870	830	0.0	4.8

\*Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

Forest Service, Dale Bosworth. No news has been released regarding that contact.

### Idaho and Lewis Counties

- Sport fishing in Idaho generates hundreds of millions of dollars in spending every year bringing much needed dollars to rural areas while adding millions of dollars in tax revenue to state coffers. According to the Idaho Department of Fish and Game, anglers added \$438 million to the state's economy last year, and the Clearwater region (North Central Idaho) netted the biggest portion at \$87 million. More than 470,000 fishing trips were made to the region with the greatest percentage of the money spent on restaurants and groceries,

followed by transportation, fishing tackle, equipment, hotels and campgrounds, and finally outfitters and guides. Anglers each spent an average of \$1,100 in 2003 or \$112 per day while averaging nearly 10 days of fishing. "Sport fishing in the state is a tremendous economic engine," said Fish and Game Fisheries Chief Virgil Moore. "Most of us fish because it's just fun, but in the process of having fun we spend money, and that is important to our local economies and perhaps more important than anything, the rural economies of this state." That kind of spending is critical to small-town communities like Riggins and Orofino where anglers come to fish for steelhead and salmon.

#### Latah County

- With the grain harvest barely underway farmers are optimistic. Crops appear to be slightly better than normal this year, due mostly to timely rains in late May and early June that helped the grain to mature. Farmers throughout the region suffered low spring crop yield last year because of dry soil conditions and relentless hot weather that kept the grain heads from filling out properly. Farmers are expecting overall success this year, which will coincide with prices nudging the \$4.00 a bushel mark, according to Tom Riedner of CLD Pacific Grain in Lewiston. "No one's finished anything, so there's no idea of the yields," Riedner said. "From what's coming in, it's pretty good quality." According to the U.S. Department of Agriculture trading charts in early August, soft white wheat at Portland was selling for \$3.98 to \$3.99 per bushel. A year ago that price was \$3.65 to \$3.68 a bushel. Continued good prices will depend on world stocks, export demand, and how well the harvests turn out in competitor nations such as Canada and Australia. Russia and other former Soviet states are also putting some pressure on the world market, supplying what until a few years ago they have been buying from the U.S. and other producers. Riedner said China has finally come into the market for soft white wheat and could be a lucrative customer in the years ahead. Egypt also buys a great deal of grain from the Pacific Northwest, as well as Japan and Korea. Pakistan may also figure into the mix this year, he said.

#### Nez Perce and Asotin (WA) Counties

- Two sources of adult refreshments in North Central Idaho and Southeastern Washington have changed hands. King Beverage, an Anheuser-Busch distributor in Spokane, has purchased Frontier Distributing, which served Lewiston, Moscow, and Pullman, and Valley Beverage, which covered Clarkston and Walla Walla. Two area warehouses were closed following the purchase—one operated by Valley Beverage in Clarkston and one operated by Frontier Distributing in Pullman. All 20 employees in Lewiston, Clarkston,

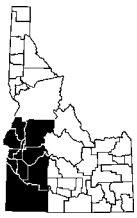
Moscow, and Pullman were offered jobs with King Beverage, said Ted Rusnak, president and chief officer of King Beverage. King Beverage has plans to expand the operation of the former Frontier Distributing at 2004 Fourth Avenue North in Lewiston, a move that could boost employment there. The warehouse has a capacity to handle 600,000 cases of beer a year. But Rusnak hasn't decided whether to overhaul the building or find a new location.

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Seaport Table 2: Population of North Central Idaho Cities, 2000-2003

Location	July 1, 2003 Population	July 1, 2002 Population	July 1, 2001 Population	Census 2000 Population	Population Change Census 2000 to July 1, 2003	Percent Change Census 2000 to July 1, 2003
<b>Clearwater Co.</b>	8,401	8,469	8,628	8,930	-529	-5.9%
Elk River	140	142	146	156	-16	-10.3%
Orofino	3151	3152	3215	3247	-96	-3.0%
Pierce	561	569	584	617	-56	-9.1%
Weippe	386	386	394	416	-30	-7.2%
<b>Idaho Co.</b>	15,413	15,498	15,452	15,511	-98	-0.6%
Cottonwood	1008	1021	949	944	64	6.8%
Ferdinand	147	149	143	145	2	1.4%
Grangeville	3146	3184	3201	3228	-82	-2.5%
Kamiah	1160	1153	1119	1160	0	0.0%
Kooskia	666	675	678	675	-9	-1.3%
Riggins	404	410	411	410	-6	-1.5%
Stites	225	225	225	226	-1	-0.4%
White Bird	106	106	106	106	0	0.0%
<b>Latah Co.</b>	35,087	35,045	35,182	34,935	152	0.4%
Bovill	298	302	303	305	-7	-2.3%
Deary	534	543	548	552	-18	-3.3%
Genesee	915	929	938	946	-31	-3.3%
Juliaetta	591	600	605	609	-18	-3.0%
Kendrick	358	363	366	369	-11	-3.0%
Moscow	21,707	21,514	21,613	21,291	416	2.0%
Onaway	223	227	228	230	-7	-3.0%
Potlatch	759	773	780	791	-32	-4.0%
Troy	774	785	790	798	-24	-3.0%
<b>Lewis Co.</b>	3,748	3,729	3,619	3,747	1	0.0%
Craigmont	554	553	536	556	-2	-0.4%
Nezperce	515	515	502	523	-8	-1.5%
Reubens	72	71	69	72	0	0.0%
Winchester	307	307	298	308	-1	-0.3%
<b>Nez Perce Co.</b>	37,699	37,171	36,983	37,410	289	0.8%
Culdesac	375	372	372	378	-3	-0.8%
Lapwai	1,126	1,115	1,114	1,134	-8	-0.7%
Lewiston	30937	30543	30433	30904	33	0.1%
Peck	185	183	183	186	-1	-0.5%

Source: U.S. Bureau of the Census, Release July 2004



# TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

## EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) seasonally adjusted unemployment rate for June 2004 was 4.6 percent, as shown in Treasure Valley Table 1. This was four-tenths of a percentage point above the May 2004 rate of 4.2 percent, and one half of a percent below the June 2003 rate of 5.1 percent. From June 2003 to June 2004, the number of employed persons increased by 9,600, a 4.1 percent increase. The number of unemployed persons decreased by 800, a 6.5 percent drop, creating a net increase in the *Civilian Labor Force* of 8,900 individuals for a 3.6 percent increase from June 2003 through June 2004. The *Civilian Labor Force* figures for June 2004 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2.

During June 2004, *Nonfarm Payroll Jobs* in the Boise MSA increased by 700 jobs, or three-tenths of a percentage point increase from May 2004. From June 2003 to June 2004,

Treasure Valley Table 2: June 2004 Seasonally Adjusted Labor Force Figures for Southwest Idaho Counties				
	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	181,402	7,282	4.0	174,121
Adams	1,635	260	15.9	1,375
Boise	2,842	159	5.6	2,682
Canyon	72,044	4,357	6.0	67,687
Elmore	9,424	614	6.5	8,811
Gem	5,361	371	6.9	4,991
Owyhee	4,431	91	2.1	4,340
Payette	9,313	757	8.1	8,557
Valley	4,154	298	7.2	3,856
Washington	4,107	426	10.4	3,681
Statewide	706,394	35,489	5.0	670,905

Treasure Valley Table 1: Boise MSA Labor Force & Employment  
Ada and Canyon Counties

	Jun 2004*	May 2004	Jun 2003	% Change Last Month	% Change Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	253,400	252,500	244,600	0.4	3.6
Unemployment	11,600	10,700	12,400	8.4	-6.5
% of Labor Force Unemployed	4.6	4.2	5.1		
Total Employment	241,800	241,800	232,200	0.0	4.1
<b>Unadjusted</b>					
Civilian Labor Force	257,000	253,500	248,000	1.4	3.6
Unemployment	11,400	10,300	12,200	10.7	-6.6
% of Labor Force Unemployed	4.4	4.1	4.9		
Total Employment	245,600	243,200	235,800	1.0	4.2
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs**</b>	239,800	239,100	230,600	0.3	4.0
<b>GOODS-PRODUCING INDUSTRIES</b>					
	48,300	47,200	45,600	2.3	5.9
<b>Natural Resources &amp; Construction</b>					
<b>Manufacturing</b>	17,300	16,700	16,100	3.6	7.5
	31,000	30,500	29,500	1.6	5.1
Durable Goods	24,000	23,600	22,400	1.7	7.1
Wood Product Manufacturing	1,700	1,700	1,800	0.0	-5.6
Fabricated Metal Products Mfg.	1,400	1,300	1,400	7.7	0.0
Machinery Manufacturing	1,100	1,100	1,200	0.0	-8.3
Computer & Electronic Manufacturing	15,100	15,000	14,300	0.7	5.6
Transportation Equipment Mfg.	1,600	1,600	1,700	0.0	-5.9
Other Durable Goods	3,100	2,900	2,000	6.9	55.0
Nondurable Goods	7,000	6,900	7,100	1.4	-1.4
Food Manufacturing	5,200	5,200	5,400	0.0	-3.7
Printing & Related Support Activities	700	700	800	0.0	-12.5
Other Nondurable Goods	1,100	1,000	900	10.0	22.2
<b>SERVICE-PROVIDING INDUSTRIES</b>					
	191,500	191,900	185,000	-0.2	3.5
<b>Trade, Transportation, &amp; Utilities</b>					
	45,800	45,400	44,000	0.9	4.1
Trade	38,600	38,200	37,100	1.0	4.0
Wholesale Trade	10,200	10,000	10,200	2.0	0.0
Wholesalers, Durable Goods	6,500	6,300	6,500	3.2	0.0
Wholesalers, Nondurable Goods	2,800	2,800	2,900	0.0	-3.4
Retail Trade	28,400	28,200	26,900	0.7	5.6
Food & Beverage Stores	4,500	4,500	4,100	0.0	9.8
General Merchandise Stores	6,200	6,200	5,800	0.0	6.9
All Other Retail Trade	17,700	17,500	17,000	1.1	4.1
Transportation, Warehousing, & Utilities	7,200	7,200	6,900	0.0	4.3
Utilities	600	600	600	0.0	0.0
Transportation & Warehousing	6,600	6,600	6,300	0.0	4.8
<b>Information</b>	4,200	4,100	3,900	2.4	7.7
Telecommunications	1,500	1,500	1,300	0.0	15.4
<b>Financial Activities</b>					
	13,200	13,100	12,600	0.8	4.8
Finance & Insurance	9,700	9,700	9,300	0.0	4.3
Real Estate & Rental & Leasing	3,500	3,400	3,300	2.9	6.1
<b>Professional &amp; Business Services</b>					
	34,600	34,100	32,200	1.5	7.5
Professional, Scientific, & Technical	11,000	10,800	10,400	1.9	5.8
Management of Companies & Ent.	5,600	5,500	5,600	1.8	0.0
Administrative & Support & Waste Mgmt.	18,000	17,800	16,200	1.1	11.1
<b>Educational &amp; Health Services</b>					
	29,500	30,200	28,300	-2.3	4.2
Educational Services	1,600	2,100	2,100	-23.8	-23.8
Health Care & Social Assistance	27,900	28,100	26,200	-0.7	6.5
Hospitals	9,600	9,800	9,200	-2.0	4.3
<b>Leisure &amp; Hospitality</b>					
	21,700	21,300	20,800	1.9	4.3
Arts, Entertainment, & Recreation	3,300	3,100	3,100	6.5	6.5
Accommodation & Food Services	18,400	18,200	17,700	1.1	4.0
Accommodation	2,000	1,900	2,000	5.3	0.0
Food Services & Drinking Places	16,400	16,300	15,700	0.6	4.5
Other Services	7,000	6,900	6,800	1.4	2.9
<b>Total Government</b>					
	35,500	36,800	36,400	-3.5	-2.5
Federal Government	5,900	5,700	5,600	3.5	5.4
State & Local Government	29,600	31,100	30,800	-4.8	-3.9
State Government	12,300	13,600	12,700	-9.6	-3.1
State Government Education	3,100	4,100	3,300	-24.4	-6.1
State Government Administration	9,200	9,500	9,400	-3.2	-2.1
Local Government	17,300	17,500	18,100	-1.1	-4.4
Local Government Education	10,900	11,100	10,600	-1.8	2.8
Local Government Administration	6,400	6,400	7,500	0.0	-14.7

\* Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

*Nonfarm Payroll Jobs* experienced a gain of 9,200 jobs, or 4.0 percent. Month-over-month, *Goods-Producing Industries* gained 1,100 jobs—600 in *Natural Resources, Mining & Construction* and 500 in *Manufacturing*. *Durable Goods Manufacturing* added the majority of the 500 new jobs in *Manufacturing*. *Fabricated Metal Product Manufacturing* and *Computer & Electronic Product Manufacturing* each added 100 new jobs. The remaining 300 jobs were in *Other Durable* and *Other Nondurable Goods Manufacturing*. Year-over-year, *Goods-Producing Industries* increased by 5.9 percent adding 2,700 jobs; 1,200 were in *Natural Resources, Mining & Construction*. *Manufacturing* accounted for the remaining 1,500-job increase. *Durable Goods Manufacturing* gained 1,600 jobs while *Nondurable Goods Manufacturing* lost 100 jobs from June 2003 to June 2004. *Computer & Electronic Product Manufacturing* significantly contributed to the increase in *Goods-Producing Industries* jobs over the year by adding 800 new jobs after large losses in prior years. *Other Durable Goods Manufacturing* added the largest number of the new jobs in the manufacturing industry with a year-over-year increase of 1,100 new jobs. Job losses were noted in *Wood Product Manufacturing* (-100 jobs), *Machinery Manufacturing* (-100 jobs), *Transportation Equipment Manufacturing* (-100 jobs), *Food Product Manufacturing* (-200 jobs), and *Printing & Related Support Activities* (-100 jobs). *Service-Providing Industries* experienced a loss of 400 jobs between May and June of 2004. This is a seasonal decline as schools closed for the summer. Other sectors of the *Service-Providing Industries* enjoyed employment gains over the month, however. One such sector was *Trade, Transportation, & Utilities*, which added 400 new jobs in June 2004, a 0.9 percent increase, all in the *Trade* industry. The growth was divided equally between *Retail Trade* and *Wholesale Trade*. *Information* also posted an employment increase in June from May of 2.4 percent, or 100 new jobs. *Financial Activities* posted a gain of 100 jobs in the *Real Estate Rental & Leasing* sector. *Professional & Business Services* experienced an increase of 500 jobs from May to June. Year-over-year, the sector increase 7.5 percent, adding 2,400 jobs. In the *Professional & Business Services* industry, employment gains were realized in *Professional, Scientific, & Technical Services*, (200 jobs), *Management of Companies & Enterprises*, (100 jobs), and *Administrative & Support & Waste Management Services* (200 jobs). *Administrative & Support & Waste Management* added 1,800 of the 2,400 jobs created in *Professional & Business Services* growing by 11.1 percent year-over-year. Job losses were noted in *Education & Health Services* as schools let out for the summer. Em-

ployment in *Education & Health Services* lost 700 jobs in from May to June 2004, but when compared to June 2003 this industry grew by 4.2 percent adding 1,200 new jobs. *Hospitals* declined in June dropping by 200 jobs, but made up 400 of the 1,200 jobs gained in the last year in the *Education & Health Services* industry. *Leisure & Hospitality* also experienced a large gain in employment from May to June of 1.9 percent, or 400 new jobs; year-over-year, the sector grew by 4.3 percent, or 900 jobs. Most of the gain in this industry occurred in *Accommodation & Food Services*, which added half of the monthly gain in *Leisure & Hospitality* and 700 of the 900 new jobs added since June 2003. The government sector lost 1,300 jobs month-over-month. This is a seasonal decline due to schools closing for summer vacation. This is illustrated by declines in jobs in *State Government Education* and *Local Government Education* of 1,000 and 200 jobs, respectively.

## AREA DEVELOPMENTS

### Boise City MSA

- Air traffic at the Boise Airport totaled 258,616 passengers in June 2004. That is a 6.0 percent increase over the June 2003 number of 242,875 total passengers. Departures, arrivals, and landings were all up by 7.0, 6.0, and 3.0, respectively. The total number of passengers traveling through the Boise Airport during the first six months of 2004 was 1,337,040, or 3.0 percent higher, than the 1,304,145 passengers recorded during the first six months of 2003.
- Construction has started on a Golden Corral restaurant in Nampa near the Edwards Theatre complex. The Golden Corral is a buffet restaurant featuring an all-you-can-eat sirloin steak option as well as serving 14 protein items each night. The Golden Corral is scheduled to open in early November.
- The City of Nampa will soon be receiving a federal grant worth \$915,566 to help with costs of renovating an empty office building that will be used to assist victims of domestic violence. The vacant city-owned office building at 1303 Third Street South will be converted into Nampa's Family Justice Center. The center may open as early as October.
- Construction on the Idaho State Historical Society library and office addition is expected to begin in August 2004. The \$4.2 million project, located on Penitentiary Road, should take about

one year to complete and will be called the Idaho History Center.

- The Boise Towne Square Mall has announced expansion plans scheduled to begin in January 2005. The 30,000-square-foot expansion will include more retail spaces as well as an anchor restaurant. Other improvements will include increasing the food court seating from 525 seats to 850 seats and redesigning the main entrance. There will be no business closures in the mall during construction.
- Construction has begun on a second location for the Ram Restaurant and Brewery. Vertical Construction of Boise is building the \$750,000 project. The new 7,000-square-foot Ram, to be located at the corner of Eagle Road and Pine Avenue, is scheduled to open in December and will employ about 100 people.
- Meridian will be the site of a Lowe's home improvement store by March 2005. The new store will be located at the corner of Ustick and Eagle Roads, and will employ 175 people. This new store will be approximately 169,000-square feet and cost \$18 million to build. The site for the store has already been cleared and construction is scheduled to begin in August.
- Nagel Beverage, Southwest Idaho's bottler and distributor of Pepsi products, is moving its operations to Nampa from Boise. The business is moving to a 250,000-square-foot plant and office complex next to Amalgamated Sugar that is currently under construction; it is expected to be complete by April 2006. The distribution center is scheduled to be complete in November and operations should begin there in January 2005. Construction of production facilities and office space is scheduled to start in mid-2005.
- Temporary staffing agencies are reporting an upswing in business. Beginning last fall and continuing since, some temporary staffing agencies are reporting a 50 percent increase in business since last year. Employers are hiring employees through these staffing firms in a broad range of industries throughout the economy.
- Matterhorn, a Caldwell based novelty ice cream manufacturer, has teamed up with Devine Foods of Philadelphia and devised a process that replaces the butter fat in ice cream bars with whole grains. The new ice cream bars are lactose free,

fat free, have low cholesterol, high fiber, and use small amounts of sugar instead of an artificial sweetener. The bulk of Matterhorn's revenue comes from making products for stores to market under their own brands, including Costco's Kirkland Signature Series. They also make products for Weight Watchers and Kroger. Matterhorn was started in 1983 and moved to Idaho from out of state in the mid-1990s.

- A new Marriott Residence Inn is currently under construction across from the Boise Towne Square Mall. The hotel will have 104 rooms and should be finished by late 2004 or early 2005.
- Keller Williams Realty, which sells both residential and commercial property in Ada and Canyon Counties, is set to begin construction in August on a new office building. Dave Evans Construction will build the new 17,000-square-foot facility at a cost of \$2 million. Keller Williams plans on expanding from its current 210 real estate agents to 275 by the end of the year. Keller Williams has been adding approximately 10 agents a month over the last few months.
- Moxie Java International has started construction of a new 8,600-square-foot corporate headquarters and distribution center in Garden City. Construction should be completed in November. Contractor Dave Evans Construction is building the facility on three quarters of an acre for an estimated \$1 million. Moxie Java cafes are located in 16 states and three locations in Japan.
- Washington Mutual has announced plans to close three commercial banking branches in Treasure Valley; one each in Boise, Nampa, and Caldwell. The closures will take place between August 20 and October 29.
- The Nampa airport has announced construction plans to relocate half of the taxiway to accommodate larger airplanes. This project is expected to begin in August and the Federal Aviation Administration is paying for 95 percent of the \$1.2 million cost. The improvements will allow the Nampa airport to accommodate planes with wingspans of up to 79 feet, up from its current maximum of 49 feet.
- Boise Cascade Corp. has sold its timber and paper assets to a private firm in Chicago for approximately \$3.2 billion in cash, a transaction that should be completed by November. The

move will allow the company to focus its efforts on distribution of office products around the world. Boise Cascade will also change its name to OfficeMax, an office product retailer that Boise Cascade bought last year. The now privately owned timber and paper manufacturing business will remain in Boise and will bear the name Boise Cascade LLC.

#### Gem County

- Officials of Gem County and the City of Emmett have signed an agreement allowing sewer waste from the Shadow Butte Industrial Park to be treated at the Emmett Sewer Treatment Plant for the next 25 years. This agreement allows infrastructure work needed for the industrial park to begin. Gem County received \$2 million from the Economic Development Administration, and was awarded a \$500,000 Community Development Block Grant from the Idaho Commerce & Labor. Gem County officials will use the money for infrastructure projects and creation of new living wage jobs in Gem County.

#### Elmore County

- The Senate Appropriations Committee recently approved the fiscal year 2005 military construction bill that includes \$39.3 million earmarked for Mountain Home Air Force Base. The money is intended to go to construction of new housing units, in this case 147 of them. The government plans to replace all housing units on base by fiscal year 2007.
- The Federal Energy Regulatory Commission has granted a new 30-year license to the C.J. Strike Dam. The 82,800-kilowatt dam is the largest of five Idaho Power dams recently given new 30-year licenses.

#### Valley County, McCall

- Ground has been broken in McCall on the East-West Loop which is a one and one-quarter mile stretch of road that will cross the Payette River and will connect the east and west sides of McCall. This project is expected to be finished in 2005.
- A contract was awarded to Masco Inc. of Boise to rebuild a large portion of East Lake Fork Road. The low bid was just over \$700,000 and construction is expected to be complete by September 1. Plans for this project include widening the road and installing bike paths.

- Construction has begun on replacing the Little Weiser Bridge. This bridge is being replaced as part of the Payette National Forest's Capital Improvement Program and to bring it up to federal transportation standards. The project will cost approximately \$204,000.
- Work has begun on replacement of the Grouse Creek Bridge near Burgdorf. The bridge, which is located about four miles east of Burgdorf and three miles north of Warren Wagon Road, was damaged in the Burgdorf fire of 2000. The bridge replacement will cost approximately \$109,000 and should be complete by September 23.
- Building permits in Valley County have continued to outpace the number of permits issued in 2003. Between January 1 and July 15 of 2004, the total number of permits issued was 17 percent more than the same time period in 2003.

#### Payette County

- Sommer Construction has begun work on sewer line extensions for two road construction projects in Fruitland. One project is beautification and widening of South Pennsylvania Avenue; the other is an extension of Kansas Avenue south to U.S. Highway 95. City construction crews are tentatively scheduled to begin adding a water main extension along Pennsylvania Avenue in August, and the widening of the street is expected to begin in September. Once the asphalt work starts the project is schedule to last six months. In addition to the widening plan, the Pennsylvania Avenue project will include bicycle paths, curbs and gutters, sidewalks and street lighting, all aimed at increasing bicycle and pedestrian safety. This project is being funded by an Idaho Transportation Department enhancement grant. The Kansas Avenue project is partially funded by a grant from the Local Highway Transportation Advisory Council. The grant is a Local Rural Highway Investment Grant worth \$100,000. This project should begin in August and be completed in October.

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# MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

## EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for June 2004 was 4.2 percent for the Magic Valley Labor Market Area (LMA) as shown on Table 1. This was two-tenths of a percentage point higher than May 2004, and one-tenth of a percentage point higher than June 2003. However, the *Civilian Labor Force* increased by 380 from May 2004, and an amazing 5,560 from June 2003. The upward trend in the unemployment rate was normal for this time of year since students flood the market looking for summer employment. The Magic Valley LMA has a high proportion of people who work multiple jobs and students and multiple jobholders compete for the higher-paying summer jobs, and so it takes a few weeks for the work force to "settle in" to summer employment. It is expected that the unemployment rate will drop in July by two- to three-tenths of a percentage point.

Most sectors have experienced excellent growth. *Construction* has increased 38.1 percent year-over-year. This is expected to increase or at least remain stable through 2004 because there are a number of commercial construction projects that will soon be underway, such as the new Lowe's Store to be built in the Weston Plaza area at Blue Lakes Boulevard and North College Road, and the new Tuesday Morning Store in the Pole Line Road East area. There are several road projects, including work around the Blue Lakes Pole Line Road intersection, and bridge repair work on the Hansen Bridge over the Snake River Canyon about eight miles east of Twin Falls. The City of Twin Falls has been especially strong in residential construction. Previous records for new housing starts were shattered in 2002 and 2003. A strong economy, and in-migration of both retired people and workers to the area for new jobs, has pushed residential construction to record heights.

The robust economy in the Magic Valley LMA has enticed many market-driven retail and service employers to the area. The *Retail Trade*, *Professional & Business*

Magic Valley Table 1: Labor Force & Employment  
Twin Falls, Jerome, and Gooding Counties

	Jun 2004*	May 2004	Jun 2003	% Change From	
				Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b><i>Seasonally Adjusted</i></b>					
Civilian Labor Force	57,970	57,590	52,410	0.7	10.6
Unemployment	2,420	2,280	2,130	6.1	13.6
% of Labor Force Unemployed	4.2	4.0	4.1		
Total Employment	55,550	55,310	50,280	0.4	10.5
<b><i>Unadjusted</i></b>					
Civilian Labor Force	58,690	57,870	53,080	1.4	10.6
Unemployment	2,230	2,160	1,960	3.2	13.8
% of Labor Force Unemployed	3.8	3.7	3.7		
Total Employment	56,460	55,710	51,120	1.3	10.4
<b>JOB BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs**</b>	45,520	45,190	40,710	0.7	11.8
<b><i>Goods-Providing Industries</i></b>	8,050	8,090	7,020	-0.5	14.7
Natural Resources & Mining	20	20	40	0.0	-50.0
Construction	2,900	2,890	2,100	0.3	38.1
Manufacturing	5,130	5,180	4,880	-1.0	5.1
Food Manufacturing	3,690	3,670	3,060	0.5	20.6
Other Manufacturing	1,440	1,510	1,820	-4.6	-20.9
<b><i>Service-Providing Industries</i></b>	37,470	37,100	33,690	1.0	11.2
Trade, Transportation & Utilities	10,950	10,790	9,650	1.5	13.5
Wholesale Trade	1,950	1,950	1,770	0.0	10.2
Retail Trade	6,710	6,690	5,920	0.3	13.3
Utilities	270	270	220	0.0	22.7
Transportation & Warehousing	2,020	1,880	1,740	7.4	16.1
Information	510	560	530	-8.9	-3.8
Financial Activities	1,780	1,770	1,790	0.6	-0.6
Professional & Business Services	6,130	6,130	5,430	0.0	12.9
Educational & Health Services	3,900	3,830	3,240	1.8	20.4
Leisure & Hospitality	3,780	3,690	3,560	2.4	6.2
Other Services	1,500	1,520	1,500	-1.3	0.0
Government Education	4,360	4,230	3,640	3.1	19.8
Government Administration	4,560	4,580	4,350	-0.4	4.8

\*Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

*Services*, and *Educational & Health Services* sectors increased by 13.3, 12.9, and 20.4 percent, respectively, year-over-year. The only sectors with significant losses year-over-year were *Natural Resources & Mining* and *Wood Products Manufacturing* with reductions of 50.0 percent and 20.9 percent, respectively.

The Magic Valley economy is definitely following the national trend toward recovery, although the western Magic Valley actually grew during recessionary times. Even the Mini-Cassia area, despite continued high unemployment is showing signs of recovery. Economic development efforts have come to fruition starting with Gossner Cheese that will employ approximately 35 workers; others companies are close to committing to move to the area. As consumer confidence is improving, retailers are growing more confident as well. In the Blaine County area tourism figures for the summer are good and employment is stable due to service sector and construction jobs. Despite high fuel prices tourism numbers are up throughout South Central



Idaho and are as high or higher than figures prior to the September 11, 2001, terrorist attacks. New retailers are moving into the Twin Falls area and the outlook there is excellent.

The major concern to the area has been—and will continue to be—water. Both irrigation reservoir reserves and ground water levels are at critical levels. The area has endured five years of extreme drought with virtually no reservoir reserves left. Six of the eight South Central Idaho counties have been declared drought disaster areas and the remaining two (Camas and Minidoka) are either preparing or submitting applications for that status. The water situation will have some effect on the 2004 crop, although overall it will be minor. Some irrigation companies will have water suspension periods running from five to seven days either in late August or early September so that adequate water will remain for late crops. It is expected that some crops will suffer in outlying areas, but so far crop quality has been good. The area also has been fortunate to have a relatively cool summer without long stretches of very high temperatures like those that occurred in the summer of 2003. Despite that the fire danger in the entire region is extremely high. Groundwater users are facing possible curtailment in using wells. Governor Dirk Kempthorne announced \$500,000 in grants to various water delivery entities to improve efficiency and conservation. It is hoped through these grants that 20,000 acre-feet of ground water can be conserved. If the winter of 2004-2005 is below average for water and snow pack, South Central Idaho, and indeed all of southern Idaho will face a serious situation next year.

## **AREA DEVELOPMENTS**

### **Twin Falls County**

- The Twin Falls City Council gave final approval for the construction of a Lowe's home improvement store in Twin Falls at the Weston Plaza, at the intersection of Blue Lakes Boulevard North and North College Road. A great deal of infrastructure improvements will take place including lengthening North College Road eastward and installing a traffic light. Construction will begin soon and the store should open sometime early in 2005. It will initially employ 130-170 full- and part-time workers at competitive wages and benefits for full-time workers.

### **Blaine, Camas, Gooding, Jerome, and Lincoln Counties**

- In early August Idaho Commerce & Labor Director Roger Madsen and other dignitaries welcomed the Hilex Poly Company to Jerome. Hilex Poly, formerly known as High Density Film Products Division of Sonoco Products Co., is a \$3 billion global packaging manufacturer. The division was established in 1980 as a manufacturer of high-density polyethylene t-shirt bags. In December 2003 the entire division was sold to Hilex Poly Co., LLC, a company owned by Leon Farahnik who founded Hilex in 1979. At the announcement, the company's Chief Operating Officer

Rex Vaughn said that it was not the building, but the workforce that attracted Hilex Poly to South Central Idaho. "There are buildings everywhere, but a workforce of this class and work ethic is unique," Vaughn said. Director Madsen welcomed the company on behalf of Governor Dirk Kempthorne and spoke about the strong partnership that Idaho Commerce & Labor has with business and that Idaho "is the best place in the nation to do business." Hilex Poly will begin hiring 40-50 workers in late November and hopes to begin production in January 2005. It also plans to faze in 40-50 more workers about every six months until a total workforce of 200 is hired by late 2006. The company offers competitive wages and benefits. Hilex Poly is currently comprised of five plants located in Pennsylvania, South Carolina, Indiana, and Texas. The Jerome plant will be the company's sixth. The headquarters is located near the Hartsville, South Carolina, plant. Hilex Poly will refurbish the Moore North American Building south of Jerome and start production in January. In 2003 Moore North American closed and approximately 100 workers were displaced.

### **Cassia and Minidoka Counties**

- Also in early August, Gossner Foods, Inc., based in Logan, Utah, became the first business to formally announce its intention to locate in the newly formed Mini-Cassia Industrial Park in Heyburn. In March 2004 the J.R. Simplot Company gifted the Heyburn Simplot Plant to the City of Burley and, in cooperation with the City of Heyburn, the Mini-Cassia Industrial Park was formed. Gossner Foods, Inc. intends to occupy a 40,000-square-foot building in the park and expand it an additional 50,000-square feet. At the announcement, Dolores Gossner Wheeler, President and CEO of Gossner Foods, indicated that it was the Mini-Cassia area's friendliness, workforce, and overall positive business environment that attracted the company to the area. She also praised the area dairy farmers and indicated that milk supply is excellent. Gossner hopes construction will be completed in October of 2005; the company will employ 35 workers initially at competitive wages and with full benefits. This announcement heralds a turnaround of the Mini-Cassia economy and, coupled with other new business openings, signals a strong economic stimulus that will help stabilize and diversify the Mini-Cassia economy. The result should be lower unemployment with less seasonal fluctuations.

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# SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

## EMPLOYMENT TRENDS

The Pocatello Metropolitan Statistical Area's (MSA) seasonally adjusted unemployment rate increased two-tenths of a percentage point in June 2004 to 4.6 percent from May 2004's revised rate of 4.4 percent. The Pocatello MSA's June unemployment rate was seven-tenths of a percentage point below the 5.1 percent rate experienced one year ago. The current unemployment rate is below the state rate of 5.0 percent and the national rate of 5.6 percent.

*Nonfarm Payroll Jobs* decreased 1.9 percent in June, a loss of 640 jobs. The job losses were primarily in *Government Education* (-990) as local school districts and Idaho State University closed until the fall semester. *Nonfarm Payroll Jobs* decreased 1.0 percent from June 2003, with 340 fewer jobs than one year ago.

## AREA ECONOMIC DEVELOPMENTS

*Please note: Information in Economic Developments is obtained from area newspapers, local Idaho Commerce & Labor offices, trade publications, local area Chambers of Commerce publications, and other sources.*

### Bannock County

- Hancock Fabrics opened at the Yellowstone Center at 675 Yellowstone in Pocatello. The store is the third business to open at the new retail center and employs 14 people.
- Deleta skating rink has remodeled their facility and added a new fun center. After remodeling was completed, the business reopened as Deleta Skating and Fun Center. The business, which offers children constructive and wholesome activities, added video games, pin ball machines, an air hockey table, and several other games.
- Two child and family treatment centers opened recently in Pocatello. Behavioral Treatment Services

Southeast Idaho Table 1: Labor Force & Employment  
Pocatello City MSA (Bannock County)

	Jun 2004*	May 2004	Jun 2003	% Change From	
				Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b>Seasonally Adjusted</b>					
Civilian Labor Force	41,230	40,920	41,870	0.8	-1.5
Unemployment	1,880	1,800	2,130	4.4	-11.7
% of Labor Force Unemployed	4.6	4.4	5.1		
Total Employment	39,350	39,120	39,740	0.6	-1.0
<b>Unadjusted</b>					
Civilian Labor Force	40,620	41,050	41,250	-1.0	-1.5
Unemployment	1,760	1,720	2,000	2.3	-12.0
% of Labor Force Unemployed	4.3	4.2	4.8		
Total Employment	38,860	39,330	39,250	-1.2	-1.0
<b>JOBS BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs** - NAICS</b>	33,440	34,080	33,780	-1.9	-1.0
<b>Goods-Producing Industries</b>	4,160	4,060	4,340	2.5	-4.1
Natural Resources & Mining	10	10	10	0.0	0.0
Construction	1,640	1,530	1,780	7.2	-7.9
Manufacturing	2,510	2,520	2,550	-0.4	-1.6
Food Manufacturing	460	460	420	0.0	9.5
Fabricated Metal Product Manufacturing	110	120	100	-8.3	10.0
Machinery Manufacturing	30	30	30	0.0	0.0
Other Manufacturing	1,910	1,910	2,000	0.0	-4.5
<b>Service-Providing Industries</b>	29,280	30,020	29,440	-2.5	-0.5
Trade, Transportation & Utilities	6,980	6,940	6,730	0.6	3.7
Wholesale Trade	1,010	1,110	1,010	-9.0	0.0
Retail Trade	4,610	4,540	4,460	1.5	3.4
Utilities	40	40	40	0.0	0.0
Transportation & Warehousing	1,320	1,250	1,220	5.6	8.2
Information	690	690	620	0.0	11.3
Financial Activities	1,740	1,810	1,940	-3.9	-10.3
Professional & Business Services	3,650	3,650	3,370	0.0	8.3
Educational & Health Services	2,680	2,700	2,810	-0.7	-4.6
Leisure & Hospitality	3,340	3,290	3,430	1.5	-2.6
Other Services	950	910	830	4.4	14.5
Government Education	4,670	5,660	5,560	-17.5	-16.0
Government Administration	4,570	4,370	4,150	4.6	10.1

\*Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

opened at 150 North Third and Child Behavior Center opened in a temporary locations at 151 North Fourth. Child Behavior Center will build a new office on Buckskin Road and Hospital Way. The business will employ 50 people when it relocates to its new facility.

- Construction continues on the first phase of Pocatello's \$6 million, three-year downtown renovation project. While a broken water main line and an unexpected number of large boulders in the soil have delayed progress, construction workers are confident the project will be completed on time. Businesses affected by the construction remain optimistic and have even showed good will toward the construction workers by providing an occasional coffee break and

lunch. Construction will continue throughout most of the summer.

- Community leaders announced plans for a new \$41 million retail development in north Pocatello. The business will be located south of Interstate 86 and east of Yellowstone Avenue near Wal-Mart. The development will include a 160,000-square-foot Lowe's Home Improvement Center, a major bookstore with a coffee shop, and several other retail businesses. A 12-screen theater, originally slated for the new development, will open at an alternative location, but the change will not alter the other plans for the development.
- Meadow Gold Dairy will discontinue its milk processing operation in Pocatello and eliminate 10 full-time and 2 part-time jobs. The company plans to continue its distribution operation and will retain those 18 jobs. The company will attempt to find replacement jobs for the workers affected by closures in their other distributions centers.

#### **Bear Lake**

- Bear Lake Caramel Company opened at 117 North Fourth in Montpelier. The new company produces gourmet caramel products including flavored caramels, a variety of caramel corn, and caramel apple kits. Caramels can be purchased individually or bagged in flavors of regular caramel, chocolate raspberry, or licorice. Caramel corn flavors include supreme, nut supreme, butter pecan, and honey almond.
- Made In Bear Lake, an artist's mall, opened at 916 Washington in Montpelier. The mall offers an outlet for the area's talented artists to show and sell their high quality items. Items available include wood products, jewelry, log furniture, and paintings.
- The Paris Tabernacle in Paris is undergoing an extensive restoration. The two-year restoration project includes restoring the steps to their original condition, replacing all the windows, the furnace and air conditioning systems, and sound system.

#### **Bingham County**

- Mountain River Birthing and Surgery Center held an open house and tour of its new facility. The specialty hospital is located at 350 North Meridian in Blackfoot. It has three labor-delivery-recovery rooms, two operating suites, and five recovery rooms designed to accommodate overnight patients. The center began delivering babies and performing surgeries in July, and employs approximately 28 people.

- VanOrden, Lund & Cannon, PLLC, held an open house of their new facility at 1487 Parkway Drive in Blackfoot. The accounting firm has been in business in Blackfoot for 13 years and moved in to the new facility in February 2004. The business employs 12 people.
- The Golden Star Restaurant opened at 45 Northwest Main in Blackfoot. The business renovated the former Cathay Café and serves Chinese cuisine.
- Phoenix Lumber opened in Blackfoot. The business is located at 838 West Collins and provides lumber and hardware as well as delivery service. Phoenix Lumber is geared to builders and contractors, and also sells to the public. The business employs six people.
- JEM Bakers Outlet opened in Blackfoot at 75 North Broadway. The bakery offers day-old products at reduced prices. Selection includes a large variety of breads, doughnuts, snacks, and other items. They also offer fresh bread every day.
- Riverside Sun and Salon opened for business on Highway 39 in Riverside. The business has a full-service hair styling salon, horizontal and vertical tanning, and massages.

#### **Franklin County**

- Family Dollar Store opened in Preston at 190 South State Street with a grand opening in July. Family Dollar Store currently has over 5,000 stores nationwide and only one other store in Idaho, located in Burley. The business created ten new jobs in the community.

#### **Power County**

- Double Shot Gourmet Espresso opened at 2842 Pocatello Avenue in American Falls. The drive-through business offers espresso, cappuccino, lattes, mochas, coffee, fresh fruit smoothies, and Italian soda. Owners Heather and Bob Ross have two other stores, both located in Pocatello.

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# NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

## EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for the Bonneville Labor Market Area (LMA) increased two-tenths of a percentage point over the month to end at 3.8 percent for June as seen in Northeast Table 1. All four counties in the LMA showed a slight increase over the month with the exception of Butte County that decreased 1.2 percentage points. The change in Butte County was the result of a decrease in the number of unemployed people by 20. Year-over-year, the Bonneville LMA's unemployment rate increased three-tenths of a percentage point, Bingham and Jefferson Counties showed increases, Butte County showed a decrease, and Bonneville County remained steady. Bonneville and Butte Counties recorded the lowest rates in the LMA, tied at 3.3 percent. Idaho Falls, the largest city in the LMA, remained unchanged at 3.3 percent month-over-month and year-over-year. The LMA's rate was 1.7 percentage points lower than the state's rate of 5.0 percent and 2.3 percentage points lower than the national rate of 5.6 percent.

Of the other six counties in Northeast Idaho, Fremont County showed the largest monthly increase at six-tenths of a percentage point to 6.3 percent. Teton County showed the largest decrease at five-tenths of a percentage point to 3.3 percent. Madison County had the lowest rate in the state in June at 1.5 percent. Year-over-year, Clark County showed the largest increase—1.4 percentage points to 5.9 percent—while Custer, Lemhi, and Fremont Counties were close behind. Teton County only increased two-tenths of a percentage point. Madison County was the only county to experience a loss, a decrease of only one-tenth of a percentage point.

*Nonfarm Payroll Jobs* increased by 1,040 jobs from May to June for a total of 68,730. Of that increase, *Construction* added the most (450 jobs) while *Government Administration* and *Leisure & Hospitality* added 340 and 240 jobs, respectively. *Government Education* (-120 jobs) and *Professional & Business Services* (-130 jobs) showed the only losses. While *Government Education* losses would be expected from May to June with summer vacation beginning, jobs losses in *Professional & Business Services* seems a little

Northeast Idaho Table 1: Labor Force & Employment  
Bonneville, Bingham, Butte, and Jefferson Counties

	Jun 2004*	May 2004	Jun 2003	% Change From	
				Last Month	Last Year
<b>INDIVIDUALS BY PLACE OF RESIDENCE</b>					
<b><i>Seasonally Adjusted</i></b>					
Civilian Labor Force	88,110	87,680	82,690	0.5	6.6
Unemployment	3,310	3,120	2,930	6.1	13.0
% of Labor Force Unemployed	3.8	3.6	3.5		
Total Employment	84,810	84,570	79,760	0.3	6.3
<b><i>Unadjusted</i></b>					
Civilian Labor Force	89,730	87,700	84,220	2.3	6.5
Unemployment	2,830	2,580	2,520	9.7	12.3
% of Labor Force Unemployed	3.2	2.9	3.0		
Total Employment	86,900	85,120	81,710	2.1	6.4
<b>JOB BY PLACE OF WORK</b>					
<b>Nonfarm Payroll Jobs** - NAICS</b>	68,730	67,690	66,170	1.5	3.9
<b><i>Goods-Producing Industries</i></b>	10,950	10,410	10,360	5.2	5.7
Natural Resources & Mining	70	70	70	0.0	0.0
Construction	5,940	5,490	4,850	8.2	22.5
Manufacturing	4,940	4,850	5,440	1.9	-9.2
Food Manufacturing	2,820	2,790	3,060	1.1	-7.8
Fabricated Metal Product Manufacturing	280	280	270	0.0	3.7
Machinery Manufacturing	420	400	440	5.0	-4.5
Other Manufacturing	1,420	1,380	1,670	2.9	-15.0
<b><i>Service-Providing Industries</i></b>	57,780	57,280	55,810	0.9	3.5
Trade, Transportation & Utilities	15,820	15,680	14,990	0.9	5.5
Wholesale Trade	5,400	5,370	5,110	0.6	5.7
Retail Trade	8,490	8,440	8,100	0.6	4.8
Utilities	120	120	120	0.0	0.0
Transportation	1,810	1,750	1,660	3.4	9.0
Information	1,120	1,100	990	1.8	13.1
Financial Activities	2,230	2,220	2,200	0.5	1.4
Professional & Business Services	12,210	12,340	12,080	-1.1	1.1
Educational & Health Services	6,860	6,850	6,490	0.1	5.7
Leisure & Hospitality	5,640	5,400	5,370	4.4	5.0
Other Services	2,040	2,040	2,270	0.0	-10.1
Government Education	5,030	5,150	5,080	-2.3	-1.0
Government Administration	6,830	6,490	6,340	5.2	7.7

\*Preliminary Estimate

\*\*Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

out of season. However, the decreases were mostly noted in the *Scientific Research & Development Services* and *Administrative & Support & Waste* sectors. Both sectors have been undergoing changes for some time, including layoffs. The Idaho National Engineering & Environmental Laboratory (INEEL) is expected to make some changes in its overall mission, which will affect INEEL's main contractor and subcontractors along with private subcontractors throughout the area.

Year-over-year, *Nonfarm Payroll Jobs* increased by 2,560 with main contributors being *Construction* (1,090 jobs), *Retail Trade* and *Wholesale Trade* combined (680 jobs), *Government Administration* (490 jobs), and *Educational & Health Services* (370 jobs). The Wells Fargo Construction Report shows cumulative yearly totals at 128 more permits for new dwelling units in Eastern Idaho compared to the same four months in 2003. (January through April is the most recent report-

ing period.) Total dollar values for permits submitted for the same time period exceeded 2003 totals by over \$7.3 million. Most of the construction project dollars (\$8.5 million) show up in Idaho Falls' commercial (new nonresidential) permits as a new Lowe's was built and the new Wal-Mart Supercenter on the west side of Idaho Falls applied for its permit during this time frame. Bonneville County (including all but Ammon and Idaho Falls) showed a large increase, \$7.5 million, in new residential construction while Ammon increased \$5 million and Idaho Falls increased \$3 million. As noted, the total comes to well over the \$7.3 million dollar mark increase. That's because there were also large decreases: Rexburg new residential construction and Rexburg new nonresidential construction combined decreased \$9.5 million and Lemhi County, not including Salmon, decreased \$1 million. While construction jobs are still ongoing in Rexburg, the majority of the permits were issued in 2002 and 2003. Salmon also finished its business incubator last year along with a few other projects. Although the Wells Fargo report is an indicator of construction activity, keep in mind that permits and construction dollars are reported in the month and year permits are acquired, yet the project itself can be ongoing for some time. Larger year-over-year losses were noted in *Manufacturing—Food and Other* sectors (500 jobs), and *Other Services* (230 jobs). Other *Manufacturing* includes the *Computer & Electronic Manufacturing* sector, which is still recovering from the national slump.

## AREA DEVELOPMENTS

### Bonneville County

- GMAC Mortgage Company opened its first Idaho Falls office at 1302 East Seventeenth Street. Elaine Moore, who previously worked for U.S. Bank, was named as the branch manager/associate district manager.
- Greyhound Lines, Inc. cut bus routes throughout the state, including the Idaho Falls routes. Along with other routes, Greyhound cut a popular twice-daily route between Salt Lake City and Butte, Montana, which also stopped in Idaho Falls. Rimrock Trailways, which previously coordinated services with Greyhound in the local area, will try to maintain the routes as best it can. Rexburg and Dubois routes have also been cut. The company cited better customer service, simpler networks, and better efficiency as reasons for the cuts and added that there will be more cuts to come. Traditionally used by the long-distance traveler, the company is seeing increasingly more customers using services for shorter distances (within a 450 mile range). Therefore, it is trying to streamline to accommodate customer demands and change with the market. Other cuts of the 260 towns in the western United States took place in Montana, Utah, and Wyoming.
- The American Red Cross opened a new Blood Services Center in Idaho Falls at the end of July. Now located at 1165 East Seventeenth Street, the center has already received enough positive feedback to let the agency know the move was worth the \$250,000 investment. The move allowed the center to keep services on one

level. The previous location had a second floor and donors had to walk up and down the stairs. The move also gives the agency more visibility now that it is located on the busiest street in Idaho Falls. Just in the first week, the center doubled its daily donors. Next year, the center plans to add stations for the collection of platelets, a needed substance for many cancer victims. As noted in the *Post Register*, donor services supervisor Terri Therp stated, "Eastern Idaho gives more blood per person than anywhere else in the state."

### Butte County

- Mackay was awarded a grant for \$30,000 from the Idaho Department of Health and Welfare, through the Rural Health Care Access program for 2004, to supplement the dental services of Dr. Tad Hancock of Pocatello. Dr. Hancock has been servicing the Mackay area for the past three years and has approximately 800 clients in the area. The money will help maintain his Mackay office and help supplement his costs for the commute.

### Madison County

- Winger's Diner broke ground in Rexburg at the end of July. The restaurant is owned by franchisee Dan Pluid of Highland, Utah, and will become the sixth Winger's in the state. The plans show 3,600-square feet (larger than other Winger's), which will seat 160 to 170 customers. The store expects to hire 70 to 75 employees in mid-September and plans to open in October.

### Teton County

- Driggs recently finished up the first SpudFest, a family-oriented film and music festival at and around the Spud Drive-In. Reports on the outcome of the first-time festival were encouraging as the festival grew throughout the first full week of August. Filmmakers and bands from throughout the United States attended. Actress Dawn Wells, who played the character MaryAnn in the 1960s television series, *Gilligan's Island*, is helping back and support the festival.
- The Teton Valley Hospital and Surgicenter in Driggs was awarded a \$15,000 grant from the Idaho Department of Health and Welfare's Rural Health Care Access program for 2004. Much of the money will be used to hire medical translators to assist Spanish-speaking community members. The center is partnering with El Puente of Jackson, Wyoming, for the services. El Puente is seeking to hire local citizens for this work since 12 percent of the hospital's service area residents speak predominantly Spanish.

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### QUARTERLY REPORT YIELDS SIZE OF FIRM DATA

The employer's quarterly Unemployment Insurance (UI) report that is filed with Idaho Commerce & Labor is a wealth of information. Besides listing wages for each employee, the report includes employment (number of employees) for each month during the quarter, by North America Industrial Classification System (NAICS) code, UI account number, and location. For those employers that have more than one worksite or establishment or are involved in several industries, a supplemental report is filed to identify the number of employees and wages paid in each location and industry. Size of firm information can be calculated from the data provided in these worksite reports. Because the size of firm information shows the distribution of workers by establishment per size class, it provides a picture of the composition of Idaho's businesses.

The size of firm data has been compiled into an annual report that provides a count of establishments, average monthly employment, total annual wages, average annual wages, percent of employment, and percent of wages by employment size class. This data for the state and six geographic regions can be found in the FYI Tables 1-7 on pages 22-25. Some size classes have been combined in order to meet Idaho's disclosure law, which states that if there are two or fewer firms in a category, the data cannot be published.

The statewide and regional tables compare size of firm data for 2001, 2002, and 2003. Three years of data were included to illustrate the lack of significant growth during the economic slowdown. The FYI tables on pages 22-25 show the change in distribution of employment and wages among the size classes as well as the percent of employment and wages by size class by region for each of the three years.

Statewide, 51.0 percent of the establishments employ **1 to 4** workers, but provide only 7.7 percent of the jobs and 2.3 percent of the total wages. Establishments with **20 to 49** employees had the largest percent of jobs—19.3 percent—and total wages—17.8 percent. In 2003, there were 41,202 establishments in Idaho up 1,337, or 3.4 percent, from 2002 and up 1,800, or 4.6 percent from 2001. The number of establishments in each size class increased in 2003 except for two—the **100 to 249** employees class and the **500 to 1,000** employee class. Size class **100 to 249** lost 5 establishments in 2003 for a total of 529. Size class **500 to 1,000** workers lost 10 establishments to 47. There were 732 establishments that employed **more than 100** workers; 23 employed **more than 1,000**.

All regions reported that nearly 70 percent of the establishments had employment between **1 and 9** workers. However, these same size classes provide less than 22 percent of the jobs and wages. Employers with **20 to 49** workers had the largest percentage of jobs and wages. The distribution of employment and wages among the other size classes varies from region to region.

Growth in North Idaho rebounded in 2003 as indicated by the addition of 257 new establishments compared to only 33 new establishments in 2002, bringing the 2003 total number to 5,866. Size classes **100 to 249** and **500 or more** lost establishments in 2003. The largest growth was in size class **1 to 4** with the addition of 133 establishments. The average covered wage increased 3.5 percent, or \$541. North Idaho had 82 establishments in 2003 with **100 or more** employees, down 2 from 2002. However, in 2003 seven of these establishments employed **500 or more** workers, down three from 2002.

North Central Idaho, the region with the fewest establishments and smallest employment, added 23 establishments bringing the 2003 total to 2,927. This addition resulted in a gain of 209 jobs and an increase in the annual average wage of 1.3 percent, or \$343. However, 3 of the 8 size classes did experience a decrease: **1 to 4**, **100 to 249**, and **500 or more**. North Central Idaho had 53 establishments with **100 or more** employees, down 1 from 2002. Seven of these establishments employed **500 or more**, down 1 from 2002.

Southwest Idaho, the region with the largest number of establishments and workers, added 490 establishments in 2003. The 16,723 establishments employed 254,342 workers, up only 131 from 2002. Six of the 9 size classes reported an increase. Two size classes, **100 to 249** and **500 to 999**, experienced decreases from 2002 with 6 and 5 establishments, respectively. The size class of **1,000 or more** remained unchanged with 10 employers in 2003. The annual average wage increased 1.8 percent to \$31,454, up \$552. Southwest Idaho had 31 establishments with **500 or more** employees, down from 36 in 2002. The area has the largest number of employers with **1,000 or more** workers, totaling 10. Significant increases in the number of employers between 2001 and 2003 occurred in two size classes: **1 to 4** added 546 establishments and **5 to 9** added 242 establishments. Although these two size classes added 2,312 workers, the growth could not offset the loss of 3,137 workers in size class **500 to 1,000**. Most of the worker loss in size class **500 to 1,000** occurred between 2002 and 2003 with the loss of 2,522 workers.

South Central Idaho's 5,972 establishments was an increase of 73 from 2002. Six of the 8 size classes reported an increase in the number of establishments. Two size classes lost establishments: *50 to 99*, down 10 establishments, and *500 or more*, down 3 establishments. The number of workers between 2002 and 2003 was virtually unchanged. However, 1,609 workers have been added since 2001, an increase of 2.2 percent. The annual average wage increased \$215 to \$24,568, the lowest regional average in the state. South Central Idaho has 84 establishments with *100 or more* workers, an increase of 4 from 2002.

Southeast Idaho, the region with the second fewest establishments and employment, had 3,696 establishments in 2003, up 67 from 2002. The growth in the number of establishments brought the average covered employment to 56,613, up 2.0 percent. This region experienced growth in 5 of the 8 size classes with the *20 to 49* size class losing 3 establishments and the *100 to 249* size class also losing 3 establishments. The annual average wage at \$25,359, was up 1.3 percent, or \$327, from 2002.

Southeast Idaho had 72 establishments with *100 or more* employees. Seven of these establishments employ *500 or more* workers, unchanged from 2002.

Northeast Idaho has the largest percent of workers in the *1,000 or more* size class. The 4,987 establishments employed an average of 72,501 workers in 2003. The six establishments in size class *1,000 or more* employed 13.5 percent of the workers and paid 23.0 percent of the total wages. Although the number of establishments in this size class was unchanged, the average annual employment increased 3.1 percent. The *500 to 999* size class was the only class to show a decrease in establishments, down 1 from 2002. The annual average wage at \$28,525, was up \$625 from 2002 or 2.2 percent. Northeast Idaho had 89 establishments with *100 or more* employees, up from 87 in 2002.

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FYI Table 1: Annual Size of Firm Data—STATE OF IDAHO

YEAR	Size of Firm	# of Establishments	Average Annual Employment	Total Annual Wage	Average Annual Wage	% of Employment	% of Wages
2003	1 - 4	21,018	43,912	1,200,767,220	27,345	7.7	7.3
	5 - 9	8,803	57,822	1,407,440,931	24,341	10.1	8.5
	10 - 19	5,700	75,448	1,921,077,189	25,462	13.1	11.7
	20 - 49	3,732	110,722	2,923,389,449	26,403	19.3	17.8
	50 - 99	1,218	82,190	2,192,673,799	26,678	14.3	13.3
	100 - 249	529	76,517	2,108,932,722	27,562	13.3	12.8
	250 - 499	133	45,868	1,343,585,202	29,293	8.0	8.2
	500 - 1,000	47	31,166	1,094,164,511	35,107	5.4	6.6
	1,000 +	23	50,320	2,270,400,428	45,119	8.8	13.8
Total		41,202	573,964	16,462,431,451	28,682	100.0	100.0
2002	1 - 4	20,266	43,014	1,161,141,706	26,995	7.5	7.2
	5 - 9	8,454	55,734	1,322,321,093	23,725	9.8	8.2
	10 - 19	5,553	73,939	1,848,739,727	25,003	13.0	11.5
	20 - 49	3,659	109,075	2,794,415,807	25,619	19.1	17.4
	50 - 99	1,201	81,702	2,142,205,348	26,220	14.3	13.3
	100 - 249	534	77,561	2,116,644,809	27,290	13.6	13.2
	250 - 499	119	40,370	1,170,376,934	28,991	7.1	7.3
	500 - 1,000	57	37,664	1,284,455,545	34,103	6.6	8.0
	1,000 +	23	51,082	2,212,782,096	43,318	9.0	13.8
Total		39,865	570,142	16,053,083,065	28,156	100.0	100.0
2001	1 - 4	19,892	42,251	1,114,293,540	26,373	7.4	7.0
	5 - 9	8,440	55,658	1,290,660,041	23,189	9.8	8.2
	10 - 19	5,492	73,003	1,769,492,593	24,239	12.8	11.2
	20 - 49	3,607	107,258	2,705,575,915	25,225	18.8	17.1
	50 - 99	1,232	83,553	2,173,461,569	26,013	14.7	13.7
	100 - 249	536	77,950	2,046,831,108	26,258	13.7	12.9
	250 - 499	125	41,955	1,236,785,323	29,479	7.4	7.8
	500 - 1,000	58	38,340	1,338,206,382	34,904	6.7	8.5
	1,000 +	21	49,968	2,147,952,197	42,987	8.8	13.6
Total		39,402	569,935	15,823,258,668	27,763	100.0	100.0



FYI Table 2: Annual Size of Firm Data—NORTH IDAHO							
YEAR	Size of Firm	# of Establish-ments	Average Annual Employment	Total Annual Wage	Average Annual Wage	% of Employment	% of Wages
<b>2003</b>	1 - 4	3,167	6,654	155,438,430	23,360	9.7	8.8
	5 - 9	1,224	7,951	182,639,665	22,970	11.6	10.3
	10 - 19	762	10,109	250,964,281	24,825	14.8	14.1
	20 - 49	493	14,697	398,426,767	27,109	21.4	22.4
	50 - 99	138	9,537	247,025,524	25,903	13.9	13.9
	100 - 249	58	8,378	232,139,416	27,708	12.2	13.1
	250 - 499	17	5,851	171,031,079	29,229	8.5	9.6
	500 +	7	5,359	138,567,866	25,855	7.8	7.8
<b>Total</b>		<b>5,866</b>	<b>68,538</b>	<b>1,776,233,028</b>	<b>25,916</b>	<b>100.0</b>	<b>100.0</b>
<b>2002</b>	1 - 4	3,034	6,441	146,120,354	22,686	9.6	8.7
	5 - 9	1,159	7,558	167,473,417	22,159	11.2	9.9
	10 - 19	727	9,661	235,283,885	24,354	14.3	13.9
	20 - 49	469	13,844	360,719,034	26,055	20.5	21.4
	50 - 99	137	9,465	236,644,815	25,003	14.0	14.0
	100 - 249	60	8,543	236,673,799	27,704	12.7	14.0
	250 - 499	14	4,718	136,471,309	28,925	7.0	8.1
	500 +	10	7,167	168,373,362	23,492	10.6	10.0
<b>Total</b>		<b>5,609</b>	<b>67,397</b>	<b>1,687,759,975</b>	<b>25,042</b>	<b>100.0</b>	<b>100.0</b>
<b>2001</b>	1 - 4	2,996	6,272	140,313,112	22,372	9.4	8.6
	5 - 9	1,178	7,630	169,441,268	22,209	11.4	10.3
	10 - 19	714	9,494	218,598,581	23,026	14.2	13.3
	20 - 49	460	13,615	337,739,845	24,806	20.4	20.6
	50 - 99	142	9,629	246,194,665	25,568	14.4	15.0
	100 - 249	65	9,398	249,806,740	26,582	14.1	15.2
	250 - 499	14	4,341	128,843,402	29,679	6.5	7.9
	500 +	9	6,456	149,762,458	23,196	9.7	9.1
<b>Total</b>		<b>5,576</b>	<b>66,834</b>	<b>1,640,700,071</b>	<b>24,549</b>	<b>100.0</b>	<b>100.0</b>

FYI Table 3: Annual Size of Firm Data—NORTH CENTRAL IDAHO							
YEAR	Size of Firm	# of Establish-ments	Average Annual Employment	Total Annual Wage	Average Annual Wage	% of Employment	% of Wages
<b>2003</b>	1 - 4	1,435	3,212	69,115,389	21,516	7.5	6.1
	5 - 9	664	4,335	94,618,198	21,826	10.2	8.3
	10 - 19	434	5,661	132,158,625	23,345	13.3	11.6
	20 - 49	258	7,710	182,507,379	23,671	18.1	16.0
	50 - 99	83	5,602	146,855,102	26,215	13.2	12.9
	100 - 249	37	5,409	130,927,900	24,205	12.7	11.5
	250 - 499	9	3,232	107,531,803	33,268	7.6	9.4
	500 +	7	7,413	274,871,119	37,077	17.4	24.1
<b>Total</b>		<b>2,927</b>	<b>42,575</b>	<b>1,138,585,515</b>	<b>26,743</b>	<b>100.0</b>	<b>100.0</b>
<b>2002</b>	1 - 4	1,441	3,241	69,943,300	21,582	7.6	6.3
	5 - 9	652	4,211	87,832,145	20,860	9.9	7.9
	10 - 19	420	5,477	126,478,688	23,095	12.9	11.3
	20 - 49	258	7,678	182,881,671	23,819	18.1	16.4
	50 - 99	80	5,294	134,325,983	25,373	12.5	12.0
	100 - 249	40	5,990	136,556,087	22,798	14.1	12.2
	250 - 499	6	2,236	87,698,603	39,226	5.3	7.8
	500 +	8	8,241	292,728,419	35,523	19.5	26.2
<b>Total</b>		<b>2,904</b>	<b>42,366</b>	<b>1,118,444,896</b>	<b>26,400</b>	<b>100.0</b>	<b>100.0</b>
<b>2001</b>	1 - 4	1,460	3,278	68,248,968	20,823	7.8	6.3
	5 - 9	646	4,228	85,801,293	20,296	10.1	7.9
	10 - 19	422	5,521	120,485,993	21,822	13.2	11.1
	20 - 49	255	7,596	181,851,092	23,939	18.1	16.7
	50 - 99	83	5,431	131,107,396	24,141	13.0	12.0
	100 - 249	39	5,692	136,711,392	24,017	13.6	12.6
	250 - 499	7	2,688	103,810,761	38,621	6.4	9.5
	500 +	7	7,442	260,378,533	34,989	17.8	23.9
<b>Total</b>		<b>2,918</b>	<b>41,876</b>	<b>1,088,395,428</b>	<b>25,991</b>	<b>100.0</b>	<b>100.0</b>

FYI Table 4: Annual Size of Firm Data—SOUTHWEST IDAHO

YEAR	Size of Firm	# of Establishments	Average Annual Employment	Total Annual Wage	Average Annual Wage	% of Employment	% of Wages
2003	1 - 4	8,549	17,520	513,997,176	29,338	6.9	6.4
	5 - 9	3,467	22,722	597,591,890	26,300	8.9	7.5
	10 - 19	2,297	30,473	830,282,001	27,247	12.0	10.4
	20 - 49	1,514	45,088	1,292,707,731	28,671	17.7	16.2
	50 - 99	549	37,138	1,076,665,727	28,991	14.6	13.5
	100 - 249	255	37,624	1,083,377,549	28,795	14.8	13.5
	250 - 499	62	21,326	637,045,017	29,872	8.4	8.0
	500 - 1,000	21	14,269	583,240,608	40,874	5.6	7.3
	1,000 +	10	28,181	1,385,119,378	49,151	11.1	17.3
	<b>Total</b>	<b>16,723</b>	<b>254,342</b>	<b>8,000,027,077</b>	<b>31,454</b>	<b>100.0</b>	<b>100.0</b>
2002	1 - 4	8,297	17,253	500,649,733	29,019	6.8	6.4
	5 - 9	3,297	21,678	556,875,997	25,689	8.5	7.1
	10 - 19	2,252	30,152	805,065,479	26,700	11.9	10.2
	20 - 49	1,496	44,747	1,232,535,123	27,545	17.6	15.7
	50 - 99	538	36,881	1,072,056,053	29,068	14.5	13.6
	100 - 249	261	38,505	1,094,312,975	28,420	15.1	13.9
	250 - 499	56	18,966	555,172,951	29,271	7.5	7.1
	500 - 1,000	26	16,791	654,120,030	38,956	6.6	8.3
	1,000 +	10	29,237	1,384,893,498	47,367	11.5	17.6
	<b>Total</b>	<b>16,233</b>	<b>254,210</b>	<b>7,855,681,839</b>	<b>30,902</b>	<b>100.0</b>	<b>100.0</b>
2001	1 - 4	8,003	16,682	469,339,299	28,134	6.5	6.0
	5 - 9	3,225	21,248	535,467,859	25,201	8.3	6.9
	10 - 19	2,231	29,803	772,056,922	25,905	11.7	9.9
	20 - 49	1,487	44,623	1,229,596,917	27,555	17.5	15.8
	50 - 99	547	37,353	1,073,241,109	28,733	14.6	13.8
	100 - 249	262	38,771	1,064,510,087	27,456	15.2	13.7
	250 - 499	60	20,151	567,617,189	28,168	7.9	7.3
	500 - 1,000	27	17,406	727,984,774	41,823	6.8	9.3
	1,000 +	10	29,191	1,357,196,432	46,494	11.4	17.4
	<b>Total</b>	<b>15,851</b>	<b>255,228</b>	<b>7,797,010,588</b>	<b>30,549</b>	<b>100.0</b>	<b>100.0</b>

FYI Table 5: Annual Size of Firm Data—SOUTH CENTRAL IDAHO

YEAR	Size of Firm	# of Establishments	Average Annual Employment	Total Annual Wage	Average Annual Wage	% of Employment	% of Wages
2003	1 - 4	2,915	6,214	173,175,491	27,870	8.4	9.6
	5 - 9	1,367	9,071	212,219,197	23,395	12.3	11.7
	10 - 19	875	11,546	285,168,308	24,698	15.7	15.8
	20 - 49	568	16,678	395,023,342	23,685	22.6	21.8
	50 - 99	163	11,165	269,442,169	24,133	15.2	14.9
	100 - 249	65	8,966	237,548,927	26,494	12.2	13.1
	250 - 499	13	4,131	105,239,050	25,475	5.6	5.8
	500 +	6	5,867	131,289,100	23,808	8.0	7.3
	<b>Total</b>	<b>5,972</b>	<b>73,637</b>	<b>1,809,105,584</b>	<b>24,568</b>	<b>100.0</b>	<b>100.0</b>
2002	1 - 4	2,863	6,174	187,624,209	30,388	8.4	10.5
	5 - 9	1,340	8,953	210,413,852	23,503	12.2	11.7
	10 - 19	873	11,632	278,871,855	23,976	15.8	15.6
	20 - 49	536	15,869	371,151,381	23,388	21.6	20.7
	50 - 99	174	11,810	270,490,119	22,903	16.0	15.1
	100 - 249	58	8,086	218,074,819	26,968	11.0	12.2
	250 - 499	13	3,912	97,969,468	25,041	5.3	5.5
	500 +	9	7,194	158,524,613	24,283	9.8	8.8
	<b>Total</b>	<b>5,865</b>	<b>73,630</b>	<b>1,793,120,316</b>	<b>24,353</b>	<b>100.0</b>	<b>100.0</b>
2001	1 - 4	2,791	6,116	187,282,614	30,624	8.5	10.9
	5 - 9	1,331	8,869	198,741,973	22,408	12.3	11.5
	10 - 19	868	11,504	268,751,863	23,362	16.0	15.6
	20 - 49	529	15,482	348,811,399	22,530	21.5	20.3
	50 - 99	171	11,631	265,725,697	22,847	16.1	15.4
	100 - 249	56	7,980	206,394,381	25,864	11.1	12.0
	250 - 499	11	3,436	92,422,014	26,901	4.8	5.4
	500 +	9	7,017	154,390,875	22,004	9.7	9.0
	<b>Total</b>	<b>5,765</b>	<b>72,033</b>	<b>1,722,520,816</b>	<b>23,913</b>	<b>100.0</b>	<b>100.0</b>

FYI Table 6: Annual Size of Firm Data—SOUTHEAST IDAHO

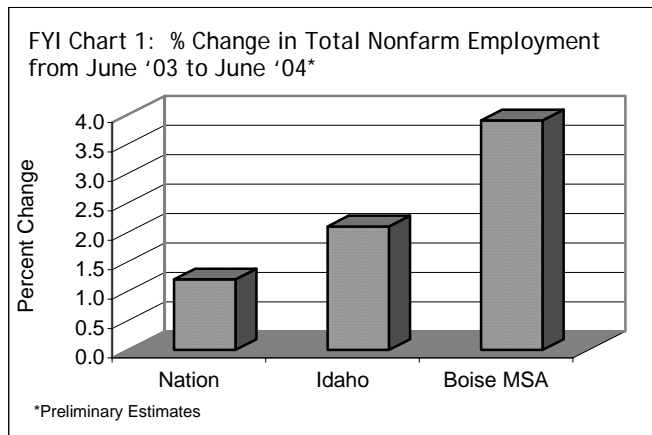
YEAR	Size of Firm	# of Establishments	Average Annual Employment	Total Annual Wage	Average Annual Wage	% of Employment	% of Wages
2003	1 - 4	1,710	3,756	83,806,833	22,315	6.6	5.8
	5 - 9	862	5,697	122,809,426	21,556	10.1	8.6
	10 - 19	564	7,443	167,885,278	22,556	13.1	11.7
	20 - 49	368	11,002	265,652,269	24,146	19.4	18.5
	50 - 99	123	8,103	200,568,922	24,753	14.3	14.0
	100 - 249	44	6,236	155,520,831	24,939	11.0	10.8
	250 - 499	21	7,252	203,770,338	28,100	12.8	14.2
	500 +	7	7,125	235,641,632	33,074	12.6	16.4
Total		3,696	56,613	1,435,655,529	25,359	100.0	100.0
2002	1 - 4	1,681	3,741	80,012,054	21,385	6.7	5.8
	5 - 9	850	5,662	117,708,801	20,788	10.2	8.5
	10 - 19	542	7,167	160,951,434	22,459	12.9	11.6
	20 - 49	371	11,243	266,088,200	23,666	20.3	19.2
	50 - 99	113	7,550	181,846,526	24,086	13.6	13.1
	100 - 249	47	6,576	167,512,238	25,473	11.9	12.1
	250 - 499	20	6,863	194,130,846	28,287	12.4	14.0
	500 +	7	6,686	220,759,024	33,017	12.0	15.9
Total		3,629	55,489	1,389,009,123	25,032	100.0	100.0
2001	1 - 4	1,661	3,757	76,235,968	20,291	6.7	5.5
	5 - 9	875	5,826	120,481,179	20,682	10.3	8.6
	10 - 19	542	7,180	159,061,705	22,153	12.7	11.4
	20 - 49	357	10,702	245,400,735	22,930	19.0	17.6
	50 - 99	120	8,080	187,854,428	23,251	14.3	13.5
	100 - 249	47	6,451	161,678,012	25,062	11.5	11.6
	250 - 499	21	7,282	216,016,086	29,663	12.9	15.5
	500 +	8	7,051	227,973,935	32,334	12.5	16.3
Total		3,630	56,328	1,394,702,048	24,760	100.0	100.0

FYI Table 7: Annual Size of Firm Data—NORTHEAST IDAHO

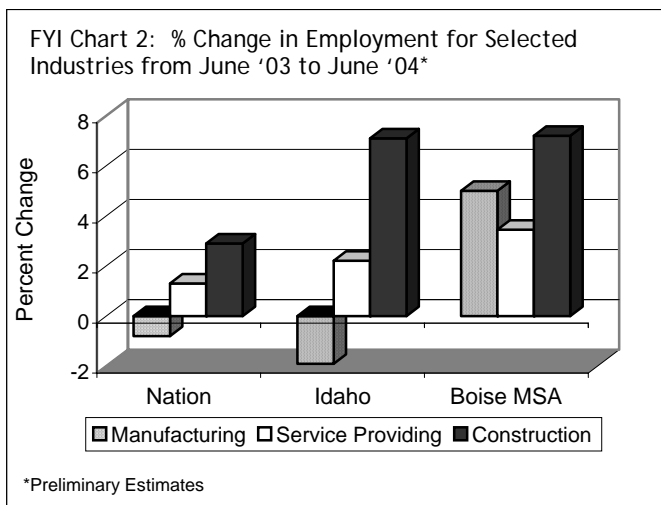
YEAR	Size of Firm	# of Establishments	Average Annual Employment	Total Annual Wage	Average Annual Wage	% of Employment	% of Wages
2003	1 - 4	2,437	5,333	129,691,149	24,319	7.4	6.3
	5 - 9	1,115	7,342	169,383,429	23,069	10.1	8.2
	10 - 19	707	9,400	227,146,979	24,164	13.0	11.0
	20 - 49	486	14,238	342,137,467	24,030	19.6	16.5
	50 - 99	153	10,011	229,912,439	22,966	13.8	11.1
	100 - 249	67	9,295	243,116,992	26,157	12.8	11.8
	250 - 499	11	3,731	112,708,977	30,209	5.1	5.4
	500 - 1,000	5	3,384	139,192,272	41,136	4.7	6.7
	1,000 +	6	9,767	474,787,304	48,612	13.5	23.0
Total		4,987	72,501	2,068,077,008	28,525	100.0	100.0
2002	1 - 4	2,293	5,116	120,429,587	23,541	7.6	7.1
	5 - 9	1,062	7,056	157,316,842	22,295	10.5	9.3
	10 - 19	678	9,034	214,175,368	23,707	13.4	12.7
	20 - 49	486	14,434	335,578,389	23,248	21.4	19.9
	50 - 99	146	9,748	221,807,974	22,755	14.5	13.1
	100 - 249	65	9,013	222,923,213	24,734	13.4	13.2
	250 - 499	10	3,113	89,207,793	28,655	4.6	5.3
	500 - 1,000	6	3,964	170,943,900	43,123	5.9	10.1
	1,000 +	6	9,465	446,894,795	47,215	14.0	26.5
Total		4,751	70,944	1,979,277,861	27,899	105.3	117.3
2001	1 - 4	1,661	3,757	76,235,968	20,291	6.7	5.5
	5 - 9	875	5,826	120,481,179	20,682	10.3	8.6
	10 - 19	542	7,180	159,061,705	22,153	12.7	11.4
	20 - 49	357	10,702	245,400,735	22,930	19.0	17.6
	50 - 99	120	8,080	187,854,428	23,251	14.3	13.5
	100 - 249	47	6,451	161,678,012	25,062	11.5	11.6
	250 - 499	21	7,282	216,016,086	29,663	12.9	15.5
	500 +	8	7,051	227,973,935	32,334	12.5	16.3
Total		3,630	56,328	1,394,702,048	24,760	100.0	100.0

## IDAHO OUTPACES NATION IN JOB GROWTH, LAGS IN AVERAGE WEEKLY WAGE GROWTH

Idaho's *Nonfarm Employment* grew 2.1 percent between June 2003 and June 2004 while the Boise MSA grew 3.9 percent, ahead of the national rate of 1.2 percent, as shown in FYI Chart 1.



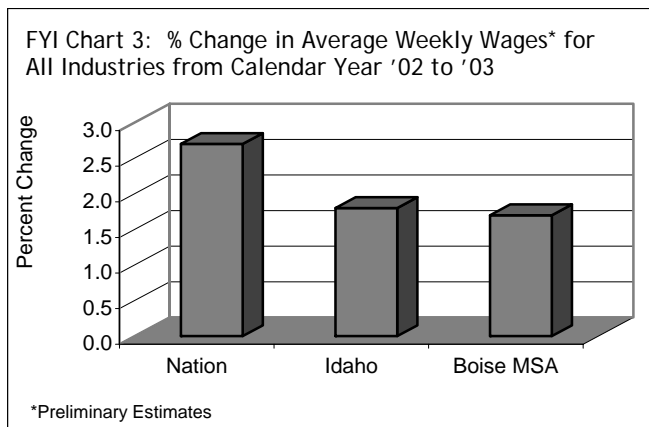
*Manufacturing* for the nation was down 0.8 percent during that same time period while Idaho was down 1.9 percent, as shown in FYI Chart 2. However, *Construction* in the Boise MSA grew 5.0 percent over the year. The reason for the statewide reduction in *Manufacturing* jobs is largely due to the downturn in the forest products and the food processing industries in Idaho, which are mostly located outside of the Boise MSA.



Idaho's *Service-Providing Industries* and *Construction* industry outpaced the nation in job growth, as Chart 2 also shows. Idaho's *Service-Providing Industries* grew 2.2

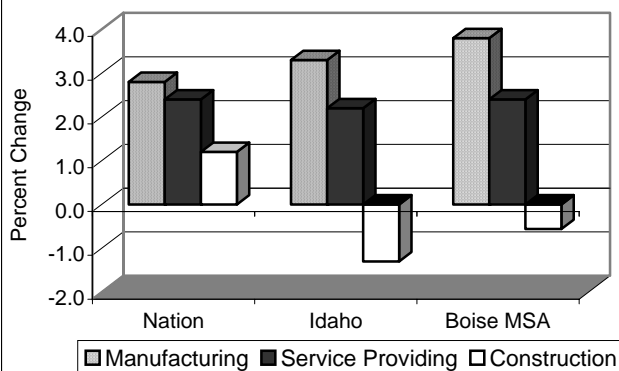
percent over the year and the Boise MSA grew 3.5 percent, while the nation only grew 1.3 percent. Within the *Service-Providing Industries, Education & Health Services*, along with *Professional & Business Services* were the driving forces for Idaho and the Boise MSA. In *Construction*, Idaho grew 7.1 percent over the year and the Boise MSA grew 7.2 percent, while the nation only grew 2.9 percent.

Although Idaho outpaced the nation in job growth, both statewide and in the Boise MSA, it lagged in average wage increases for all industries for calendar year 2003, as FYI Chart 3 shows. Idaho's average weekly wages increased 1.8 percent and the Boise MSA increased 1.7 percent, while the nation increased 2.7 percent.



Wage increases the state and the MSA experienced from calendar year 2002 to 2003 were driven by *Manufacturing*, as FYI Chart 4 shows (see page 27). The average weekly wages for *Manufacturing* in Idaho rose 3.3 percent; *Manufacturing* wages in the Boise MSA rose 3.8 percent, above the national average of 2.8 percent. Idaho outpaced the nation in wage growth for *Manufacturing*, which is largely attributed to the high tech computer industries and the majority of those jobs are in the Boise MSA. FYI Chart 4 also shows that average weekly wages in the *Service-Providing Industries* in Idaho and the Boise MSA rose 2.2 percent and 2.4 percent, respectively, keeping pace with the national average wage growth of 2.4 percent. However, FYI Chart 4 also shows that *Construction* workers in Idaho and the Boise MSA did not realize wage increases in 2003, as did their counterparts throughout the nation. The average weekly wages for *Construction* workers in Idaho and the Boise MSA de-

FYI Chart 4: % Change in Average Weekly Wages\* for Selected Industries from Calendar Year '02 to '03



\*Preliminary Estimates

creased 1.3 percent and 0.6 percent respectively, while the average weekly wages for the nation increased 1.2 percent.

Idaho's statewide job growth in the *Service-Providing Industries* and *Construction*, coupled with the strong growth in *Manufacturing* in the Boise MSA, have helped Idaho slightly outpace the nation in job growth. However, Idaho's average weekly wage increase from 2002 to 2003 have lagged behind the nation due to minimal average weekly wage increases in the *Service-Providing Industries* and average weekly wage decreases in *Construction*.

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## PANHANDLE NEWS — (continued from page 4)

trails, chairlift rides, and mountaintop concerts. Silver Velocity Paintball, which opened in June, is a short walk above the gondola's top. The paintball area's 19 inflatable air bunkers are easy to move, so the course can be changed often. The course also features two sandbag bunkers and multiple trees.

- This summer, Silver Mountain is open Wednesdays through Sundays, instead of Thursdays through Sundays as in past summers. Local store and restaurant owners say they are thrilled with the extra day of gondola operation because it is keeping more tourists in the Silver Valley.
- Avery, a village with 50 year-round residents, lies along the St. Joe River, which flows from the Bitterroot Mountains on the Montana border west toward St. Maries. Mountains cut Avery off from the Silver Valley of Shoshone County most of the year, so Avery looks to St. Maries, 37 miles away, for most of its goods and services.

While the Avery district makes up three-fifths of the acreage in Shoshone County, fewer than 500 people live there, while 12,500 people live in the northern part of Shoshone County. The other villages in the district are Calder, halfway between Avery and St. Maries, and Clarkia near Shoshone County's southwest corner.

The Avery School District 394 runs two elementary-middle schools in Calder and Avery. When children graduate from eighth grade, they attend high school in St. Maries. The Avery School District is Idaho's smallest with an enrollment of 29 students recorded in fall 2003.

Avery once was an important rail center. Since the Milwaukee Railroad abandoned the rail line in the early 1980s, its economy exclusively revolves around its forests. The U.S. Forest Service is the largest employer, while logging companies are the next largest source of jobs. Stores serve residents and the many people who come to enjoy the district's bounty of hunting, fishing, biking, hiking, kayaking, and snowmobiling opportunities. Altogether, there are 75 year-round jobs in the Avery district with a summer peak of 145 jobs.

Avery is drawing more visitors than ever because of its proximity to an entry point to the highly popular Route of the Hiawatha, the rails-to-trails project that opened in 1999 and extends along the old Milwaukee rail line northward to Lookout Pass on the Montana border, where it hooks up to Montana trails.

Avery's rail heritage pays off in other ways. During the last few years, the Avery Citizens Committee renovated the old Milwaukee Railroad depot. The depot, built in 1909, needed a new foundation, fresh siding, paint, floors, and a heating system. The depot serves as the community center, post office, museum, library, and meeting hall. The committee now is trying to renovate a 1948 Milwaukee Railroad car.

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# Glossary of Labor Market Terms

**Agriculture Employment:** Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

**Average Hourly Earnings/Average Weekly Hours:** The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12<sup>th</sup> of the month.

**Average Weekly Earnings:** Average Hourly Earnings multiplied by Average Weekly Hours.

**Civilian Labor Force:** A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

**Consumer Price Index (CPI):** A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

**Covered Employers:** Employers who are subject to state and federal Unemployment Insurance laws.

**Durable Goods:** Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

**Employed:** Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12<sup>th</sup> day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

**Initial Claim:** Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

**Labor Market Area (LMA):** An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

**Metropolitan Statistical Area (MSA):** An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a

total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are five MSAs in Idaho—Boise City-Nampa MSA (including Ada and Canyon Counties), Coeur d’Alene MSA (Kootenai County), Idaho Falls MSA (Jefferson and Bonneville Counties), Lewiston MSA (Nez Perce County in Idaho and Asotin County in Washington), Logan MSA (Franklin County and the Logan, Utah, Metro Area), and Pocatello City (Bannock County).

**Nonfarm Wage & Salary Employment:** Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12<sup>th</sup> of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

**Nondurable Goods:** Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

**Seasonally Adjusted:** Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

**Unemployed:** Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12<sup>th</sup> of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

**Unemployment Insurance:** Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

**Unemployment Rate:** The number of persons unemployed expressed as a percentage of the labor force.

**Weekly Benefit Amount:** The amount payable to a claimant for a compensable week of total unemployment.

**Weeks Claimed:** The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

**Weeks Compensated:** The number of weeks for which compensation was actually paid.